DOCUMENT RESUME

ED 282 012 CE 047 104

AUTHOR Doran, Dorothy; And Others

TITLE Administrative Support.
INSTITUTION Northern Arizona Univ., Flagstaff. Center for Vocational Education.
SPONS AGENCY Arizona Occupational Research Coordinating Unit, Phoenix.
PUB DATE Aug 86
NOTE 297p.
PUB TYPE Guides - Classroom Use - Guides (For Teachers) (052)

EDRS PRICE MF01/PC12 Plus Postage.
DESCRIPTORS Behavioral Objectives; *Business Education; Communication Skills; Competency Based Education; Coordination; Equipment Utilization; Learning Activities; Lesson Plans; *Managerial Occupations; Office Machines; *Office Occupations Education; *Receptionists; Recordkeeping; Secondary Education; *Secretaries; Supervisory Methods; Telephone Usage Instruction; *Word Processing
IDENTIFIERS *Administrative Assistants

ABSTRACT

This guide is intended to assist business education teachers in administrative support courses. The materials presented are based on the Arizona validated occupational competencies and tasks for the occupations of receptionist, secretary, and administrative assistant. Word processing skills have been infused into each of the three sections. The guide includes competency/skill task lists, an employability skills charts crosswalk, an instructor's guide to 39 validated competencies, and an annotated bibliography. Each section of the curriculum guide contains the following: competency/skill, task, performance objective (including conditions, evaluation measure, and standard), suggested student learning experiences, suggested instructional techniques, necessary instructional equipment and materials, recommended resources, and information sheets. The following are among the 10 receptionist, 14 secretarial, and 15 administrative assistant skills/competencies covered: uses written and oral communication and personal responsibility skills; uses office equipment to complete job tasks; applies principles of records filing; uses reference materials in completing job tasks; organizes work area; schedules appointments according to company procedures; receives and places telephone calls; receives visitors to the office; processes mail according to company procedures; applies principles of financial record keeping; maintains office supplies; coordinates travel and business meeting arrangements; and supervises personnel. (MN)

****
* Reproductions supplied by EDRS are the best that can be made *
* from the original document. *
****

ARIZONA CENTER FOR VOCATIONAL EDUCATION
RESEARCH · CURRICULUM · PROFESSIONAL DEVELOPMENT

GREAT SEAL OF THE STATE OF ARIZONA
DITAT DEUS
1912

U.S. DEPARTMENT OF EDUCATION
Office of Educational Research and Improvement
EDUCATIONAL RESOURCES INFORMATION CENTER (ERIC)

☐ This document has been reproduced as received from the person or organization originating it.
☐ Minor changes have been made to improve reproduction quality.

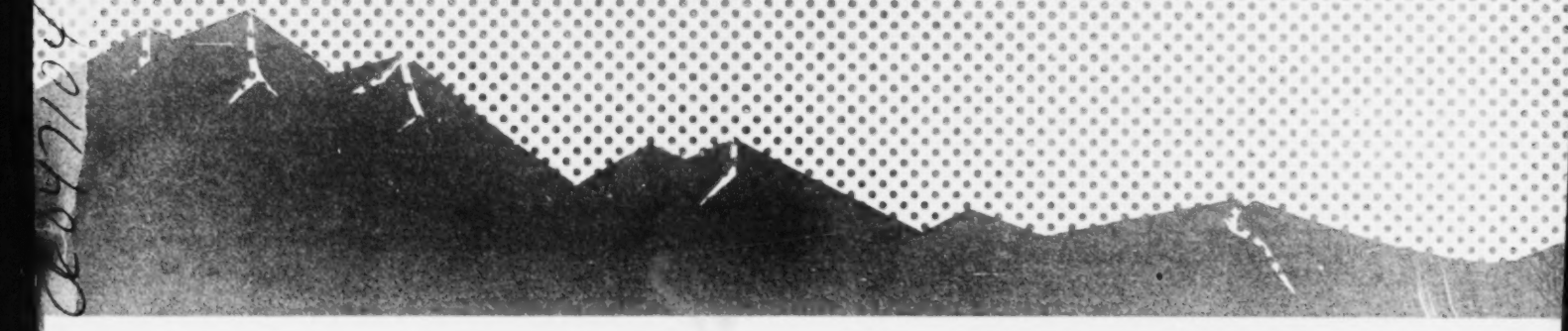
• Points of view or opinions stated in this document do not necessarily represent official OERI position or policy.

"PERMISSION TO REPRODUCE THIS MATERIAL HAS BEEN GRANTED BY

TO THE EDUCATIONAL RESOURCES INFORMATION CENTER (ERIC)."

ED282012

ADMINISTRATIVE SUPPORT



ARIZONA DEPARTMENT OF EDUCATION
CAROLYN WARNER, Superintendent
DR. JIM HARTGRAVES, Deputy Superintendent
JOHN LANGE, Deputy Superintendent,
State Director for Vocational Education

ARIZONA CENTER FOR VOCATIONAL EDUCATION
CENTER FOR EXCELLENCE IN EDUCATION
NORTHERN ARIZONA UNIVERSITY

AUGUST 1986

BEST COPY AVAILABLE

ARIZONA DEPARTMENT OF EDUCATION

Carolyn Warner, Superintendent

Deputy Superintendent
Dr. Jim Hartgraves

Vocational Education Division
Mr. John T. Lange
Deputy Superintendent
for Vocational Education

Education Services Division
Mr. David L. Tate
Associate Superintendent

General Operations Division
Mr. James J. Brunstein
Associate Superintendent

STATE BOARD OF EDUCATION

STATE BOARD OF VOCATIONAL EDUCATION

Tom Espinoza ..... President
Ray Borane ..... Vice President
Honorable Carolyn Warner ..... Executive Officer
Eddie Basha ..... Member
C. Diane Bishop ..... Member
Dr. Eugene M. Hughes ..... Member
Betty Inman Lee ..... Member
David B. Silva ..... Member
Karin Kirksey Zander ..... Member

BEST COPY AVAILABLE

FUNDING INFORMATION

Project Title: Curriculum

Educational Act Under Which the Funds Were Administered: Carl D. Perkins Vocational Education Act of 1984, P.L. 98-524

Source of Grant: Arizona Department of Education
Phoenix, Arizona

Grantee: Arizona Center for Vocational Education
Center for Excellence in Education
Northern Arizona University
Flagstaff, Arizona 86011

Disclaimer: This publication was prepared pursuant to guidelines of the Curriculum Project, a funded project by the Arizona Department of Education. Contractors undertaking such projects are encouraged to express freely their judgment in professional and technical matters. Points of view or opinions do not, therefore, necessarily represent official Arizona Department of Education position or policy.

Discrimination Prohibited: Title VI of the Civil Rights Act of 1964 states: "No person in the United States shall, on the grounds of race, color, or national origin, be excluded from participation in, be denied the benefits of, or be subjected to discrimination under any program or activity receiving Federal financial assistance." Title IX of the Education Amendments of 1972 states: "No person in the United States shall, on the basis of sex, be excluded from participation in, be denied the benefits of, or be subjected to discrimination under any education program or activity receiving Federal financial assistance." Therefore, the Arizona Center for Vocational Education Project, like every program or activity receiving assistance from the Arizona Department of Education, must operate in compliance with these laws.

Printed by the
Arizona Center for Vocational Education
Flagstaff, Arizona
Total Copies Printed: 400 Unit Printing Cost: $5.64
Total Printing Cost: $2,255.40 Date of Printing: September, 1986
On behalf of the Arizona Department of Education

ADMINISTRATIVE SUPPORT

Written By:

Dr. Dorothy Doran
Dr. Stella Sorensen
Sandra Nelson

Project Director

Nancy F. Dillon

ARIZONA CENTER FOR VOCATIONAL EDUCATION

CENTER FOR EXCELLENCE IN EDUCATION

NORTHERN ARIZONA UNIVERSITY

SEPTEMBER, 1986

FOREWORD

The Administrative Support Competency Based Curriculum Guide has been developed for business teachers who deliver the Administrative Support program.

The guide is based on the Arizona validated occupational competencies and tasks, which have been sequenced for the three occupations within the Administrative Support cluster: Receptionist, Secretary and Administrative Assistant. The fourth occupation for which competencies were validated, Word Processing Specialist, is no longer a high demand occupation in Arizona. However, the skills of a Word Processing Specialist have become a set of skills that all office workers need. Therefore, the word processing skills have been infused within the three administrative support occupations in this guide.

Each page of this guide includes information related to a specified task within the competency and the performance objective necessary for the students to successfully complete the task.

You are encouraged to supplement this guide with materials you have developed and other curriculum.

A sincere effort was made to maintain the integrity of the industry-validated competencies, while preparing these materials as a usable resource for you.

Validated competencies have been utilized in curriculum design by both the Arizona Department of Education and the Community Colleges in Arizona. A major effort was made by both agencies to compile the lists of competencies into one list. Now, one articulated list includes all validated competencies for an entire program area.

This one list was accomplished by a group of educators. Representatives included: members of the State Board of Education, Vocational Committee to the Board, State Community College Board staff, Community College administrators and instructors, Arizona Department of Education Vocational staff, Northern Arizona University Curriculum Project Director, and high school teachers from the entire state.

During the articulation process, competencies and tasks were changed to enhance readability and continuity. In some instances, two or more tasks were combined into one task if they were similar. Other tasks were edited and modified for clarity and conciseness. Reorganization of competencies and tasks was done to sequence their order more logically. In this process, no competencies or tasks were omitted; however, they may have been combined with others, modified, or sequenced.

A new feature is the format which is designed for individual student use. The teacher can duplicate the pages directly from this curriculum guide which shows the COMPETENCY/SKILL, TASK, PERFORMANCE OBJECTIVE, and STUDENT LEARNING EXPERIENCES.

ACKNOWLEDGEMENTS

The Administrative Support Competency based Curriculum Guide is the result of many people working together to insure quality programs through quality curriculum for students seeking education and training in the business occupations represented by the Administrative Support cluster.

Members of the Arizona Business Education Advisory Council have been instrumental in securing industry validators and providing direction and support in the curriculum model process.

Teachers from across the state making up the Administrative Support Curriculum Committee worked diligently to insure that the integrity and sequence of the competency statements would be formatted in a usable form for teachers. The following is a list of committee members:

Dr. Dorothy Doran (writer)
Yavapai Community College

Sandra Nelson (writer)
Arizona State University

Orca Galloway
Cortez High School

Dr. Stella Sorensen (writer)
Yuma High School

Dr. Robert Gryder (advisor)
Arizona State University

Dolores Stotts
Winslow High School

Orland Merrill
St. David High School

Joanne Walker
Arizona Department of Education

Ellen Irving-Furch, Metro Tech VIP, researched the original competency lists for the Administrative Support Curriculum Guide. Periodically, throughout the curriculum model process, consultants Margaret Baumgardner, Delores Christensen and Rex Foster performed specific tasks.

The committee responsible for the articulation list included:

Diana Dias
Scottsdale Community College

Dr. Dorothy Doran
Yavapai College

Orca Galloway
Cortez High School

Sandra Nelson
Northeast Valley Education Center

Dr. Richard Seals
Cochise College

Dr. Stella Sorensen
Yuma High School

Dolores Stotts
Winslow High School

Joanne Walker
Arizona Department of Education

Direction and leadership provided by Janet Gandy, State Supervisor of Business Education and Dave Muehlbauer, Curriculum Coordinator for Arizona Department of Education, has resulted in a guide which reflects the most current business practices and procedures in the Administrative Support cluster of occupations.

We are grateful to the entire staff of the Arizona Center for Vocational Education for their support, concern and assistance. Special thanks to the Curriculum Unit: Dr. Jerry R. Cox, Nancy F. Dillon, Kathi Jeffers, Cass Sandbakken, and the two computer input operators, Barbara Oftedahl and Sue Peters. In addition, we are grateful to Kathy Dunn for her leadership and assistance in getting the final curriculum guide completed, and Carole Ferlazzo for reviewing the curriculum for equity.

Dr. Robert V. Kervood
Director
Arizona Center for
Vocational Education

Don Parsons
Manager
Arizona Center for
Vocational Education

John Lange
Deputy Superintendent
State Department of Vocational
Education
Arizona Department of Education

Barbara Border
Deputy Associate Superintendent
Arizona Department of Education

TABLE OF CONTENTS

	Page
FUNDING	ii
FOREWORD	v
ACKNOWLEDGEMENTS	vi
COMPETENCY/SKILL AND TASK LISTS	xi
EMPLOYABILITY SKILLS CHARTS CROSSWALK	xviii
INSTRUCTOR'S GUIDE	1
ANNOTATED BIBLIOGRAPHY	249

COMPETENCY/SKILL AND TASK LIST

RECEPTIONIST

1.0 Uses written and oral communications skills
- 1.1 Writes/prints legibly
- 1.2 Uses concise, specific and grammatically correct language in communications with callers
- 1.3 Uses information about organization, operations and structure of company
- 1.4 Proofreads and edits to produce mailable business documents

2.0 Uses personal responsibility skills
- 2.1 Conducts oneself in a courteous, businesslike manner at all times
- 2.2 Uses effective time management

3.0 Uses office equipment to complete job tasks.
- 3.1 Operates an electronic/electric typewriter
- 3.2 Operates an electronic calculator
- 3.3 Operates a copier

4.0 Applies principles of records filing
- 4.1 Indexes, codes, sorts, and files documents for alphabetic, numeric, subject, chronological, and geographical filing
- 4.2 Maintains filing system

5.0 Uses references materials in completing job tasks
- 5.1 Uses telephone directories
- 5.2 Uses and maintains company directory, city directory, and a zip code directory
- 5.3 Uses dictionary, atlas, maps, and timetables
- 5.4 Keeps telephone numbers and addresses necessary for emergencies in a convenient place for quick reference

6.0 Organizes work area
- 6.1 Keeps the reception area neat throughout the day
- 6.2 Keeps desk neat and arranges for coverage of desk at all times

7.0 Schedules appointments following company procedures
- 7.1 Makes appointments requested by executive
- 7.2 Makes appointments for others to see executive
- 7.3 Reschedules future appointments

8.0 Receives and places telephone calls
- 8.1 Describes telephone services available and how they are used
- 8.2 Places outgoing calls
- 8.3 Answers telephone
- 8.4 Transfers calls
- 8.5 Takes messages
- 8.6 Receives telephone calls for visitors during meeting

9.0 Receives visitors to the office
- 9.1 Greets visitors and determines purpose of the visit
- 9.2 Applies company policies and executive preference regarding an unscheduled visitor
- 9.3 Applies company policies and executive preference regarding a scheduled visitor
- 9.4 Manages visitors who are waiting in the reception area

10.0 Processes mail following company procedures
- 10.1 Processes incoming mail based on the employer's needs
- 10.2 Processes outgoing mail based on the employer's needs

SECRETARY

1.0 Uses written and oral communication skills
- R 1.1 Writes/prints legibly
- R 1.2 Uses concise, specific and grammatically correct language in communications with callers
- R 1.3 Uses information about organization, operations and structure of company
- R 1.4 Proofreads and edits to produce mailable business documents
- 1.5 Compliles information and composes written communications to produce mailable business documents

2.0 Uses personal responsibility skills
- R 2.1 Conducts oneself in a courteous, businesslike manner at all times
- R 2.2 Uses effective time management
- 2.3 Maintains familiarity with personnel policies

3.0 Uses office equipment to complete job tasks
- R 3.1 Operates an electronic/electric typewriter
- R 3.2 Operates an electronic calculator by touch
- R 3.3 Operates a copier
- 3.4 Understands the concept of an information system and the elements comprising it
- 3.5 Uses information processor to prepare business documents
- 3.6 Manipulates files using keyboard commands to merge stored information
- 3.7 Maintains records and files using knowledge of records management to store retrieve and purge information
- 3.8 Applies efficient dictation/transcription procedures
- 3.9 Correct minor office machine malfunctions and if malfunction cannot be corrected by the operator, reports it to a service firm

4.0 Applies principles of records filing
- R 4.1 Indexes, codes and files documents for alphabetic, numeric, subject, chronological, and geographical filing
- R 4.2 Maintains filing system
- 4.3 Determines records filing needs; recommends and establishes a records management system
- 4.4 Revises a filing system

5.0 Uses references materials in completing job tasks
- R 5.1 Uses telephone directories
- R 5.2 Uses and maintains company directory, city directory, and a zip code directory
- R 5.3 Uses dictionary, atlas, maps, and timetables
- R 5.4 Keeps numbers and addresses necessary for emergencies in a convenient place for quick reference

6.0 Organizes work area
- R 6.1 Keeps desk neat and arranges for coverage of desk at all times

7.0 Schedules appointments following company procedures
- R 7.1 Makes appointments requested by executive
- R 7.2 Makes appointments for others to see executive
- R 7.3 Reschedules future appointments

8.0 Receives and places telephone calls
- R 8.1 Describes telephone services available and hov they are used
- R 8.2 Places outgoing calls
- R 8.3 Answers telephone
- R 8.4 Transfers call
- R 8.5 Takes messages
- R 8.6 Receives telephone calls for visitors during meeting

9.0 Receives visitors to the office
- R 9.1 Greets visitors and determines purpose of the visit
- R 9.2 Applies company policies and executive preference regarding an unscheduled visitor
- R 9.3 Applies company policies and executive preference regarding a scheduled visitor
- R 9.4 Manages visitors who are waiting in the reception area

10.0 Processes mail following company procedures
- R 10.1 Processes incoming mail based on the employer's needs
- R 10.2 Processes outgoing mail based on the employer's needs
- R 10.3 Prepares parcels and packages carefully so that the contents will be delivered quickly and in good condition
- 10.4 Files return, insurance, and registered mail receipts
- 10.5 Transmits mail electronically

11.0 Applies principles of financial recordkeeping
- 11.1 Maintains petty cash fund
- 11.2 Maintain a checkbook
- 11.3 Prepares payroll

12.0 Maintains office supplies
- 12.1 Orders and receives office supplies
- 12.2 Maintains office inventory of supplies

13.0 Coordinates travel arrangements
- 13.1 Uses knovledge of time zones, passports, visas and innoculations in arranging travel (domestic and foreign)
- 13.2 Organizes and packs materials relating to business activities that are necessary to make the trip successful
- 13.3 Coordinates the tasks necessary to maintain a smooth and continous vork flov in the executive's absence
- 13.4 Perform follov-up activities resulting from the trip

14.0 Coordinates business meeting arrangements
- 14.1 Schedules meetings/conferences
- 14.2 Records minutes of meeting accurately and consistently if a recording secretary is not assigned
- 14.3 Handles follov-up meeting activities

R=Receptionist

ADMINISTRATIVE ASSISTANT

1.0 Uses written and oral communications skills
- R 1.1 Writes/prints legibly
- R 1.2 Uses concise, specific and grammatically correct language in communcications with callers
- R 1.3 Uses information about organizations, operations and structure
- R 1.4 Proofreads and edits to produce mailable business documents
- S 1.5 Compiles information and composes written communications to produce mailable business documents
- 1.6 Scans written materials to obtain information
- 1.7 Interprets and analyzes narrative and financial resource materials
- 1.8 Establishes office procedures

2.0 Uses personal responsibility skills
- R 2.1 Conducts oneself in a courteous, businesslike manner at all times
- R 2.2 Uses effective time management
- S 2.3 Maintains familiarity with personnel policies

3.0 Uses office equipment to complete job tasks
- R 3.1 Operates an electronic/electric typewriter
- R 3.2 Operates an electronic calculator
- R 3.3 Operates a copier
- S 3.4 Understands the concept of an information system and the elements comprising it
- S 3.5 Uses information processor to prepare business documents
- S 3.6 Manipulates files using keyboard commands to merge stored information
- S 3.7 Maintains records and files using knowledge of records management to store retrieve and purge information
- S 3.8 Applies efficient dictation/transcriptions procedures
- S 3.9 Correct minor office machine malfunctions and if malfunction cannot be corrected by the operator, reports it to a service firm
- 3.10 Recommends new technology for performing information processing tasks and facilitates changes

4.0 Applies principles of records filing
- R 4.1 Indexes, codes and files documents for alphabetic, numeric, subject, chronological, and geographical filing
- R 4.2 Maintains filing system
- S 4.3 Determines records filing needs; recommends and establishes a records management system
- S 4.4 Revises a filing system

5.0 Uses references materials in completing job tasks

R 5.1 Uses telephone directories

R 5.2 Uses and maintains company directory, city directory, and a zip code directory

R 5.3 Uses dictionary, atlas, maps, and timetables

R 5.4 Keeps numbers and addresses necessary for emergencies in a convenient place for quick reference

5.5 Collects related materials from several reference sources, organizes, and analyzes information to prepare reports, contracts, and budgets

6.0 Organizes work area

R 6.1 Keeps desk neat and arranges for coverage of desk at all times

7.0 Schedules appointments following company procedures

R 7.1 Makes appointments requested by executive

R 7.2 Makes appointments for others to see executive

R 7.3 Reschedules future appointments

8.0 Receives and places telephone calls

R 8.1 Describes telephone services available and how they are used

R 8.2 Places outgoing calls

R 8.3 Answers telephone

R 8.4 Transfers calls

R 8.5 Takes messages

R 8.6 Receives telephone calls for visitors during meeting

9.0 Receives visitors to the office

R 9.1 Greets visitors and determines purpose of the visit

R 9.2 Applies company policies and executive preference regarding an unscheduled visitor

R 9.3 Applies company policies and executive preference regarding a scheduled visitor

R 9.4 Manages visitors who are waiting in the reception area

10.0 Processes mail following company procedures

R 10.1 Processes incoming mail based on the employer's needs

R 10.2 Processes outgoing mail based on the employer's needs

S 10.3 Prepares parcels and packages carefully so that the contents will be delivered quickly and in good condition

S 10.4 Files return, insurance, and registered mail receipts

S 10.5 Transmits mail electronically

11.0 Applies principles of financial recordkeeping

S 11.1 Maintains petty cash fund

S 11.2 Maintains a checkbook

S 11.3 Prepares payroll

12.0 Maintains office supplies

S 12.1 Orders and receives office supplies

S 12.2 Maintains office inventory of supplies

13.0 Coordinates travel arrangements

S 13.1 Uses knowledge of time zones, passports, visas and inoculations in arranging travel (domestic and foreign)

S 13.2 Organizes and packs materials relating to business activities that are necessary to make the trip successful

S 13.3 Coordinates the tasks necessary to maintain a smooth and continous work flow in the executive's absence

S 13.4 Performs follow-up activities resulting from the trip

14.0 Coordinates business meeting arrangements

S 14.1 Schedules meetings/conferences

S 14.2 Records minutes of meeting accurately and consistently if a recording secretary is not assigned

S 14.3 Handles follow-up meeting activities

S 14.4 Assists employer in developing materials for presentations

14.5 Recommends alternative methods of holding meetings

15.0 Supervises Personnel

15.1 Makes work assignments

15.2 Familarizes new employees with business

R = Receptionist
S = Secretary

The Employability Skills Charts, which follow, are used to show a crosswalk between the charts and the curriculum guide. Numbers next to **RELATED BASIC SKILLS, JOB SKILLS** and **RESPONSIBILITY SKILLS** are the competency or task numbers in the curriculum. To determine which employability skill may be incorporated into teaching, compare the skill with the competency or task number shown.

Receptionist
Related Basic Skills

MATHEMATICS

*S3.0 Uses addition, subtraction, multiplication, and division.

COMMUNICATIVE ARTS

8.6 Listens for specific information and repeats message for confirmation and clarification.

1.0 Follows oral and written instructions accurately.

1.0 Follows logical sequence when giving written and oral directions.

**R1.2 Communicates using concise, specific, and grammatically correct language in a pleasant tone of voice.

1.4 Recognizes errors in grammar, spelling, word division, and abbreviations in written materials.

5.2 Identifies and interprets resource materials, for example: office manual.

1.1 Interprets organizational structure to make appropriate referrals.

* Secretary
**Receptionist

Receptionist
Job Skills

8.3	Answers telephone, deals with and directs calls, records and distributes messages.
8.2	Operates telephone equipment. Places local and long-distance telephone calls.
9.1	Greets and directs visitors, makes introductions and provides information.
3.1, 3.3	Operates and takes care of basic office equipment such as typewriter and copier.
1.3	Uses legible and accurate handwriting in all numbers, letters, and words.
3.1	Keyboards letters, reports, forms, envelopes and labels.
1.4	Reads and corrects typewritten material.
10.1, 10.2	Prepares, receives, sorts, and distributes incoming and outgoing mail.
5.1	Uses reference books such as telephone directory and dictionary.
4.1	Files letters, reports, forms.
2.4	Organizes and performs work in order of importance to employer.

Receptionist
Responsibility Skills

2.5	Conducts oneself in a courteous, business-like manner at all times and uses tact when working with public or co-workers.
2.1	Demonstrates willingness to be trained in new technologies.
2.1	Practices punctuality and dependability.
2.1	Demonstrates a pleasant, positive attitude.
2.1	Maintains good personal health and grooming; dresses appropriately.
2.1	Accepts responsibility for own actions.
2.1	Asks appropriate questions to determine a person's needs.
9.1	Gives a clear, pleasant, concise welcome to callers.
2.1	Maintains a professional attitude at work.
2.2	Works well under pressure and manages stress.
2.3	Demonstrates flexibility and is adaptable.
2.4	Manages time effectively; organizes work and uses unstructured time productively.

Secretary

The Secretary has mastered the receptionist skills and:

Related Basic Skills

MATHEMATICS

11.2 Uses whole numbers, fractions, decimals, and percentages for accounting purposes.

2.5 Uses logic in problem-solving and decision-making, for example: Handling questionable communication.

SCIENCE

12.0 Explains effects of chemical deterioration on office products, for example: shelf life.

5.0 Collects, organizes, and analyzes information for a specific purpose.

COMMUNICATIVE ARTS

3.0 Reads and interprets computer output.

4.0 Describes various numeric and alphabetical filing systems, retention and purging processes.

13.0 Uses knowledge of time zones, passports, visas, and inoculations in arranging travel.

Secretary

The Secretary has mastered the receptionist skills and:

Job Skills

3.0	Operates and takes care of advanced office equipment such as word processing equipment, dictating/transcribing systems.
3	Takes dictation in short form and types into readable copy.
3.1	Composes letters and memos at the keyboard.
4.3	Sets up and keeps office files using current techniques for filing procedures.
8.0, 10.1, 10.2	Takes needed action on incoming and outgoing communications.
3.4	Uses a computer terminal to enter and retrieve data, and reads and checks computer printouts.
7.0	Schedules appointments and keeps employer informed of schedule.
13.0	Makes travel arrangements and prepares travel expense reports for employer.
14.0	Arranges and prepares for meetings and conferences.
11.0	Performs basic bookkeeping tasks.
12.1	Orders, receives and distributes office supplies and keeps supply records.
2.0	Uses current laws, policies, and procedures related to the work of the office.

Secretary

The Secretary has mastered the receptionist skills and:

Responsibility Skills

2.2 Plans and organizes day's work according to priorities and manages time with maximum effectiveness.

2.5 Uses discretion and decision-making skills.

2.2 Operates as a team member of the organization.

2.2 Demonstrates diplomacy and tact in working with organization's business associates, public, supervisors, and co-workers.

**R2.1 Uses honesty in dealing with others.

2.2 Recognizes confidentiality, ethical, and legal responsibilities.

2.1 Practices neatness in work habits.

2.2 Identifies and follows the chain of command in all work situations in the organizational structure.

** Receptionist

Administrative Assistant

The Administrative Assistant has mastered the receptionist and secretary skills and:

Related Basic Skills

MATHEMATICS

11.2 Uses percentages, fractions, statistical formulas, and decimals.

5.0 Knows how to present data in a variety of formats, for example: charts, tables, graphs.

12.0 Knows how to use comparison shopping and pricing methods in selecting equipment.

SCIENCE

5.0 Knows how to use research methods and sources.

COMMUNICATIVE ARTS

1.0 Knows how to use correct grammatical format, punctuation, spelling, abbreviations, and word division guidelines.

1.0 Knows how to write clear, concise speeches and summaries of meetings.

1.0 Speaks using concise, specific, and grammatically correct non-technical language.

1.0 Scans written materials to obtain information.

1.0 Knows how to interpret and analyze narrative and financial resource materials.

1.0 Knows how to write objectives with measurable standards.

Administrative Assistant

The Administrative Assistant has mastered the receptionist and secretary skills and:

Job Skills

5.0	Researches, analyzes, and prepares reports, contracts, and budgets.
15.0	Reviews office procedures and recommends needed changes.
16.0	Recommends applicants, familiarizes new employees with business, outlines job duties, assigns and schedules employees' activities.
14.0	Assists employer in developing materials for presentations.
4.0	Keeps business documents and records secure and confidential.
1.0, 15.0	Communicates and works effectively with management and support staff.
3.0	Establishes maintenance schedules and informs employees.
1.0	Writes and edits reports and directions, including policy and procedure manuals, questionnaires, and survey forms.
16.0	Establishes work flow and task analyses.
4.0	Interprets legislation regarding record retnetion, information privacy and protection, industrial security, and applies organization's retention policy.

Administrative Assistant

The Administrative Assistant has mastered the receptionist and secretary skills and:

Responsibility Skills

2.0	Takes a positive, responsible leadership position to bring aobut organizational efficiency, loyalty, and integrity.
15.0	Assumes leadership in absence of supervisor.
1.0	Observes confidentiality and responds to violations of organizational security.
2.0	Demonstrates a positive self-concept.
16.0	Works as a team member or a leader of a team in the organization.
2.0	Uses good time management.
2.0	Performs duties with self-motivation and a minimum of supervision.
15.0	Foresees problems and formulates plans to avert them.
15.0	Uses inquisitiveness to seek information, develop new procedures, and reach a goal.
2.0	Demonstrates patience.
17.0	Stays current with legislation.

RECEPTIONIST

1.0 **COMPETENCY/SKILL:** Uses written and oral communication skills.

1.1 **TASK:** Writes/prints legibly.

PERFORMANCE OBJECTIVE:

CONDITIONS: Given a job-related situation requiring a written response,

EVALUATION: handwrites or prints the response,

STANDARD: with all items on the penmanship checklist rating acceptable.

STUDENT LEARNING EXPERIENCES:

1. Write and print several job application blanks.
2. Record telephone messages and rate them on a penmanship checklist.
3. Print unusual size labels.
4. Write and print sample documents such as checks, deposit slips, petty cash slips and reimbursement forms, etc.

SUGGESTED INSTRUCTIONAL TECHNIQUES:

1. Illustrate how poor penmanship can lead to costly errors. Examples: entries on order forms and checks, information for filing (and finding!), scheduling, dates, addresses which result in non-delivery, etc.

2. Collect Samples.

3. Assign students practice office situations in which information is recorded by hand--telephone memos, writing in columns and on lines, checks, orders, dates, transferring figures from one form to another, etc. Check for handwriting and proofread for accuracy.

4. Do not accept illegible handwriting.

5. Integrate handwriting skills with activities in other modules in building business skills. Vocabulary activities or completing handwritten forms such as an application blank are examples.

INSTRUCTIONAL EQUIPMENT, MATERIALS, AND SUPPLIES:

1. Penmanship checklist and selected forms.

RESOURCES:

ARIZONA BUSINESS OCCUPATIONS COMPETENCY-BASED CURRICULUM GUIDE. Arizona Department of Education, Phoenix, AZ. Pages CA/W 5. 1980-81.

ARIZONA BUSINESS OCCUPATIONS COMPETENCY-BASED CURRICULUM GUIDE. Arizona Department of Education, Phoenix, AZ. Chapter Handwriting, pages 1-20. 1982.

Branchaw, B. P. ENGLISH MADE EASY. Gregg/McGraw-Hill Book Company, Novato, CA. 2ND ED. 1986.

Wittenberg, M. A., and P. R. Voiles. MODERN BUSINESS ENGLISH. Gregg/McGraw-Hill Book Company, Novato, CA. 7TH ED. 1986.

1.0 **COMPETENCY/SKILL:** Uses written and oral communication skills.

1.2 **TASK:** Uses concise, specific and grammatically correct language in communications with callers.

PERFORMANCE OBJECTIVE:

CONDITIONS: Given a role-playing situation in which the teacher places a call,

EVALUATION: answers the call and records the necessary message,

STANDARD: with acceptable ratings on a grammar checklist.

STUDENT LEARNING EXPERIENCES:

1. Listen to recorded materials and rate them on a grammar checklist.

2. Record from rough draft materials in correct grammatical form. Rate the playback on a grammar checklist.

3. Record simulated phone calls and rate the playback on a grammar checklist.

4. Record the oral response to a request for directions to a specific location (example: local airport) or directions for the operation of a piece of equipment (example: the copy machine). Rate the playback on a grammar checklist.

SUGGESTED INSTRUCTIONAL TECHNIQUES:

1. Invite a local business person to speak on the importance of using concise, specific, and grammatically correct language in the business world.

2. Supply each student with a copy of the grammar checklist and evaluation forms which have been designed to rate recorded materials and calls.

INSTRUCTIONAL EQUIPMENT, MATERIALS, AND SUPPLIES:

1. Grammar checklist, tape recorder (voice transcriber). Telephone training equipment (optional).

RESOURCES:

ARIZONA BUSINESS OCCUPATIONS COMPETENCY-BASED CURRICULUM GUIDE. Arizona Department of Education, Phoenix, AZ. Pages CA/I 1-6, CA/LS 1-13. 1980-81.

Branchav, B. P. ENGLISH MADE EASY. Gregg/McGrav-Hill Book Company, Novato, CA. 2ND ED. 1986.

Burtness, Paul S., and Jack E. Hulbert. EFFECTIVE BUSINESS COMMUNICATION. South-Western Publishing Company, Cincinnati, OH. 1985.

Murphy, Herta A., and Herbert W. Hildebrandt. EFFECTIVE BUSINESS COMMUNICATIONS. Gregg/McGrav-Hill Book Company, Novato, CA. 4TH ED. 1984.

Stevart, Marie M., Kenneth Zimmer, Lyn Clark. BUSINESS ENGLISH AND COMMUNICATION. Gregg/McGrav-Hill Book Company, Novato, CA. 6TH ED. 1984.

Williams, John W., and Steven A. Eggland. COMMUNICATION IN ACTION. South-Western Publishing Company, Cincinnati, OH. 1985.

1.0 **COMPETENCY/SKILL:** Uses written and oral communication skills.

1.3 **TASK:** Uses information about organization, operations and structure of company.

PERFORMANCE OBJECTIVE:

CONDITIONS: Given a sample office manual and directory and a set of 10 questions,

EVALUATION: searches for answers and provides answers in the format requested,

STANDARD: with 90 percent accuracy.

STUDENT LEARNING EXPERIENCES:

1. Review sample company manuals and directories. Compare content and organizational structure.

2. Locate the page(s) where specific facts about the company are to be found. Examples: founding date, president, branches, etc.

3. Locate the page(s) where specific facts about company policies are to be found. Examples: vacation, salary, promotion, attendance, sick leave, work schedule, etc.

4. Identify the company chain of command or department structure.

5. Reply orally form to requests for information about the company policies. Example: dress policy.

6. Reply in written form to request for information about company policies. Example: insurance benefits and/or retirement benefits.

SUGGESTED INSTRUCTIONAL TECHNIQUES:

1. Ask students to prepare a comparison chart of the table of contents of two or more company manuals.

2. Give the students a list of questions to which answers may be found by using the available references. Ask students to record reference consulted and page where the information can be found.

3. Place phone calls in which students are requested to supply company policy information.

4. Develop simulation activities which include requests for information from company policy manuals and directories. The student would:
   A. Reply to a request from a student for information about the dress policies.
   B. Reproduce requested retirement information, type a cover memo, send to prospective retiree.
   C. Answer memo requesting information about vacation policy.

5. Divide the class into teams. Give each team questions on individual cards. Have teams compete in finding information. Base competition on time and accuracy.

INSTRUCTIONAL EQUIPMENT, MATERIALS, AND SUPPLIES:

1. Sample company policy manuals and directories. Typewriter and/or text editor. Telephone training equipment (optional).

RESOURCES:

ARIZONA BUSINESS OCCUPATIONS COMPETENCY-BASED CURRICULUM GUIDE. Arizona Department of Education, Phoenix, AZ. Pages RS 1-5. 1980-81.

Hampton, D. R. MANAGEMENT. Gregg/McGraw-Hill Book Company, Novato, CA. 3RD ED. 1986.

Keeling, B. L., and N. F. Kallaus. ADMINISTRATIVE OFFICE MANAGEMENT. South-Western Publishing Company, Cincinnati, OH. Abridged, 8TH ED. 1984.

Steade, R., J. Lowry, R. Glos. BUSINESS: ITS NATURE AND ENVIRONMENT--AN INTRODUCTION. South-Western Publishing Company, Cincinnati, OH. 10TH ED. 1984.

1.0 **COMPETENCY/SKILL:** Uses written and oral communication skills.

1.4 **TASK:** Proofreads and edits to produce mailable business documents.

PREFORMANCE OBJECTIVE:

CONDITIONS: Given a sample of a finished document with 10 errors,

EVALUATION: proofreads and edits the document with 10 errors,

STANDARD: with 100 percent accuracy.

STUDENT LEARNING EXPERIENCES:

1. Read, check for accuracy and correct printed/typed document.
2. Edit written communications using proofreader marks.
3. Use more than one proofreading method.

SUGGESTED INSTRUCTIONAL TECHNIQUES:

1. Introduce or review different proofreading marks and methods:
   a. Proofread all material before it is removed from the typewriter/printer.
   b. Proofread all material after it is removed from the typewriter/printer.

2. Introduce the team proofreading technique.

3. Collect articles from printed media which contain errors.

4. Collect examples of typewritten documents that are frequently found at the reception desk for proofreading.

5. Require that students proofread and appropriately mark their own work throughout the course.

6. Assign one or more student(s) to serve as class proofreader for a project.

INSTRUCTIONAL EQUIPMENT, MATERIALS, AND SUPPLIES:

1. Source documents, typewriter (or text editor), list of proofreader marks.

RESOURCES:

ARIZONA BUSINESS OCCUPATIONS COMPETENCY-BASED CURRICULUM GUIDE. Arizona Department of Education, Phoenix, AZ. Pages T 4-5, 9, 19; W/IP 27, CA/R 4. 1980-81.

Camp, Sue C. DEVELOPING EDITING SKILL. Gregg/McGraw-Hill Book Company, Novato, CA. 1985.

Lee, Jo Ann. PROOFREADING SKILLS FOR WORD PROCESSING. Harcourt Brace Jovanovich, Orlando, FL. 1986.

2.0 **COMPETENCY/SKILL:** Uses personal responsibility skills.

2.1 **TASK:** Conducts oneself in a courteous, businesslike manner at all times.

PERFORMANCE OBJECTIVE:

CONDITIONS: Given a list of terms for courteous, businesslike work attitudes and a list of definitions,

EVALUATION: matches the list of terms with the definitions,

STANDARD: with 90% accuracy.

STUDENT LEARNING EXPERIENCES:

1. Maintain a professional attitude at work and in the classroom.

2. Work well under pressure and manage stress.

3. Demonstrate flexibility and adaptability.

SUGGESTED INSTRUCTIONAL TECHNIQUES:

1. Work with the following experiences individually or in combination as you complete some of the teaching suggestions:
   a. work attitudes.
   b. pressure and stress situations.
   c. flexibility and adaptability.

2. Prepare personal checklists, complete them, and develop a personal growth plan based on individual answers.

3. Use role playing situations, case studies, and decision making projects that relate to the experiences. Ask students to write case problems from experiences.

4. Display cartoons and bulletin board items illustrating courtesy and businesslike manners.

5. Have a businessperson speak on attitudes desired in a beginning employee.

6. Stress these experiences through year-round class procedures.

7. Provide a role model by practicing courteous and businesslike procedures in your teaching.

INSTRUCTIONAL EQUIPMENT, MATERIALS, AND SUPPLIES:

1. Checklists, bulletin board displays, case studies, classroom timer or stopwatch. Telephone training equipment (optional).

RESOURCES:

ARIZONA BUSINESS OCCUPATIONS COMPETENCY-BASED CURRICULUM GUIDE. Arizona Department of Education, Phoenix, AZ. pages HR 1-18. 1980-81.

Bixler, Susan. THE PROFESSIONAL IMAGE. South-Western Publishing Company, Cincinnati, OH. 1985.

Golden, Nancy J. DRESS RIGHT FOR BUSINESSS. Gregg/McGraw-Hill Book Company, Novato, CA. 1986.

Luke, Cheryl M., and C. B. Steigler. OFFICE SYSTEMS AND PROCEDURES. Houghton Mifflin Company, Boston, MA. 1986.

Rosen, Arnold, and Eileen Feretic, Margaret H. Bahniuk. ADMINISTRATIVE PROCEDURES FOR THE ELECTRONIC OFFICE. John Wiley & Sons, Inc., New York, NY. 2ND ED. 1985.

Shinn, George. LEADERSHIP DEVELOPMENT. Gregg/McGraw-Hill Book Company, Novato, CA. 1986.

2.0 **COMPETENCY/SKILL:** Uses personal responsibility skills.

2.2 **TASK:** Uses effective time management.

PERFORMANCE OBJECTIVE:

CONDITIONS: Given three case problems including time management, unexpected interruptions, and wasted time,

EVALUATION: identifies the problem and recommends a solution.

STANDARD: Correctly applies the principles of time management.

STUDENT LEARNING EXPERIENCES:

1. Manage time efficiently.
   Use the following principles of good time management:
   1. Plans work flow.
   2. Breaks activities into component parts.
   3. Assigns priorities to tasks.
   4. Estimates the time for each task.
   5. Makes a time schedule.

2. Rearrange tasks if unexpected rush jobs occur.

3. Use unstructured time productively.

SUGGESTED INSTRUCTIONAL TECHNIQUES:

1. Display cartoons and bulletin board items illustrating the three learning experiences of managing time effectively.

2. Stress good time management techniques through class procedures. Have students organize and perform work in order of importance, and set and meet deadlines.

3. Provide a role model by applying good time management techniques in class.

4. Participate in role playing, case studies, and decision making projects that illustrate principles of time management: Planning, Prioritizing, Preparing. Have students write case problems from experience.

5. Develop and complete personal checklist and prepare a personal growth plan of action.

INSTRUCTIONAL EQUIPMENT, MATERIALS, AND SUPPLIES:

1. Checklist, worksheets, evaluation forms, bulletin board displays, classroom timer or stopwatch. Telephone training equipment (optional).

2. Information sheet, back of this unit.

RESOURCES:

ARIZONA BUSINESS OCCUPATIONS COMPETENCY-BASED CURRICULUM GUIDE, Arizona Department of Education, Phoenix, AZ. 1980-81.

ARIZONA BUSINESS OCCUPATIONS COMMON-CORE COMPETENCY INSTRUCTION MODULES. Arizona Department of Education, Phoenix, AZ. Chapter--Human Relations/Personal Skills. 1982.

Fruehling, Rosemary T., and Constance K. Weaver. ELECTRONIC OFFICE PROCEDURES. Gregg/McGraw-Hill Book Company, Novato, CA. 1987

Kutie, Rita C., and Joan L. Rhodes. SECRETARIAL PROCEDURES FOR THE ELECTRONIC OFFICE. John Wiley & Sons, Inc., New York, NY. 2ND ED. 1986.

Luke, Cheryl M., and C. B. Stiegler. OFFICE SYSTEMS AND PROCEDURES. Houghton Mifflin Company, Boston, MA. 1986.

Rosen, Arnold, and Eileen Feretic, Margaret H. Bahniuk. ADMINISTRATIVE PROCEDURES FOR THE ELECTRONIC OFFICE. John Wiley & Sons, Inc., New York, NY. 2ND ED. 1985.

PLANNING FOR WORK

A well-organized secretary contributes much to the productivity of the executive and the organization. Organizing and planning are just as important for the office worker as for top management. Since office workers perform a variety of tasks each day, no two days are exactly alike. There are no rigid, prescribed ways in which tasks must be performed, so the office worker must organize and plan his/her own work efficiently. You may not always be able to follow the plan when things come up, but a plan helps get work organized.

The first step in planning work is to have an organized desk and work area. A well-organized and well-equipped work station is essential to work efficiently with the least amount of time, effort, and frustration. The office worker should have all materials needed to accomplish daily tasks either on the desk, in the desk, or within easy reach.

Ideal management of time involves planning tasks and assignments so that you start them at the right time--when your work will not be interrupted, when time estimates are reasonably accurate, and when work schedules permit you to accomplish more in a given period of time. To plan an intelligent work schedule, you must first list your activities (or tasks to be performed). Next, break these activities into component parts and estimate the time needed for each part. (Keep a record of actual time taken to complete tasks with your estimated times until you become skilled in estimating time values.)

Once your tasks are identified, you must assign priorities. You must make certain that deadlines will be met for important tasks, and that more important tasks are completed before less important tasks. If an emergency comes up, your schedule must be flexible enough to accommodate the extra work.

Before outlining a new schedule, you may wish to analyze the time you spend on various tasks. Prepare a form with column headings that lists your major activities at the top and the hours of the day broken into specified time periods down the side. Check the time slots spent on each activity during the day. After a two-week period has elapsed, you should be able to determine if your time could have been organized more effectively. After carefully analyzing the way you have been using your time, you are ready to outline a new schedule.

You should look ahead to long-range tasks, weekly tasks, and daily tasks. Long-range planning involves consideration of special projects that come up annually, semiannually, or quarterly, such as reports and budgets. These tasks must be planned for within the daily, routine work schedules.

Weekly schedules should reflect any tasks that occur on a weekly basis or once or twice a month. Such tasks may include payroll work, expense reports, or weekly or monthly sales reports. Meetings or conferences that are scheduled in advance should be recorded. You should also allow time for routine tasks done on a regular basis, such as checking supply inventories and ordering supplies.

The daily schedule is your working schedule, the one you will follow each day. You must include the assignments noted on your long-range and weekly

schedules, as well as your daily tasks--typing, dictation, transcription, filing, telephoning, etc. You should plan your daily schedules for one week at a time, planning the following week's daily schedules each Friday. Check the next day's schedule each day before you leave work. It is wise to allow a half hour of extra time each day for unexpected tasks or emergencies.

These principles should be followed when preparing your daily work plan:

1. Do the most complex tasks at your best working time.
2. Do routine work when your momentum is not as great.
3. If possible, schedule your hardest tasks during uninterrupted blocks of time.
4. Group similar tasks so that you may complete work in batches.
5. Work at one task at a time, and stay with a task until it is complete (if possible).
6. Do the task right the first time.
7. Cope with interruptions; don't let them stop your concentration.
8. Use bits and pieces of time, don't waste them.
9. Manage details: use a notebook to write notes, reminders, "TO DO LIST."
10. Rate each task by priority: work to be done immediately, work to be done today, work to be done when convenient.
11. Program relaxation into your schedule; take time for short breaks when necessary to keep from becoming fatigued.
12. Coordinate your output; don't rush to complete a letter when the mail has already gone out for the day.
13. Allow for emergencies; allow extra time each day, plan for vacations and holidays.
14. Keep in touch with your boss during the day.
15. Coordinate your daily plan with your employer's work plan.

Secretaries depend on follow-up files to aid them in remembering work that must be done on a certain date. In addition to the daily appointment calendar and the "to do list", secretaries need a foolproof method of following up on work that will be pending for a week, a month, or longer. The TICKLER FILE, which provides reminders according to dates, is the most widely used method. One tickler file can be used for reminders of work to be done at a specified time and for incoming information anticipated at a specific time. Either cards or folders can be used to organize a tickler file: a card or folder is provided for each day of each month, and either notations made on the cards or information placed in the appropriate folders. At the beginning of each work day, the secretary checks the tickler card or folder for that day to note work that should be followed up on.

Another memory aid is the PENDING FILE, a file folder in which the secretary temporarily holds mail concerning matters that are pending. The secretary must be careful not to isolate in the pending file any correspondence that should be available in the regular files; copies should be made as necessary. A regular check of the pending file should be made to identify matters that should be called to your employer's attention. The tickler file and pending files may be successfully combined by using the file folder method arranged by day of month and/or month of year.

Some secretaries like to maintain a READING FILE, a chronological file of correspondence and other items you type. You simply make an extra copy of everything you type and keep it in your desk in folders arranged by weeks, with the latest folder in front. Arrange papers in each folder with the latest date in front. Discard any copies that are at least four weeks old, keeping space for this file at a minimun. You should check with your employer before beginning a reading file, since security regulations or administrative policy may prohibit such action.

In an office where several executives or secretaries need access to the reading file, a three-ring notebook is handy and may be placed in a convenient location during the day and locked up in the evening, if necessary for security. The notebook's contents may be divided and labeled into sections by orginator, department, or subject matter.

*SECRETARIAL OCCUPATIONS V-TECS GUIDE

3.0 **COMPETENCY/SKILL:** Uses office equipment to complete job tasks.

3.1 **TASK:** Operates an electronic/electric typewriter.

PERFORMANCE OBJECTIVE:

CONDITIONS: Given a handwritten rough-draft business document,

EVALUATION: types the document,

STANDARD: in mailable form.

STUDENT LEARNING EXPERIENCES:

1. Operate the keyboard by touch at 50 wpm.
2. Identify the tasks required to maintain a typewriter.
3. Identify proofreader's marks.
4. Identify various letter styles.
5. Keyboarding tables and charts.
6. Keyboard general correspondence from typed and handwritten rough draftcopy and from verbal instruction.
7. Keyboard address labels, file folder labels, file drawer labels and index cards.
8. Proofread and correct typed copy.

SUGGESTED INSTRUCTIONAL TECHNIQUES:

1. Clip articles from newspaper which contain errors, have students proofread and correct with proofreader's marks.

INSTRUCTIONAL EQUIPMENT, MATERIALS, AND SUPPLIES:

1. Electric electronic typewriter, list of proofreader marks, documents.

RESOURCES:

Crawford, T. James, Lawrence W. Erickson, Jerry W. Robinson, Lee R. Beaumont, Arnola C. Ovnby. MICROCOMPUTER KEYBOARDING FORMATTING APPLICATION. South-Western Publishing Company, Cincinnati, OH. 1986.

Lloyd, A. L., F. E. Winger, J. E. Johnson, R. A. Hall, P. C. Morrison, J. L. Rowe. GREGG TYPING, SERIES SEVEN. Gregg/McGraw-Hill Book Company, Novato, CA. 1982.

Lloyd, A. L., F. E. Winger, R. P. Poland, R. N. Hanson, A. Rossetti, S. Ober, J. L. Rowe. GREGG COLLEGE TYPING, SERIES FIVE. Gregg/McGraw-Hill Book Company, Novato, CA. 1985.

Simcoe, Annell L., Leona M. Gallion, Carol Mauermeyer, Joanne Sanvardine. KEYBOARDING FOR THE AUTOMATED OFFICE. John Wiley & Sons, Inc., New York, NY. 1986

3.0 **COMPETENCY/SKILL:** Uses office equipment to complete job tasks.

3.2 **TASK:** Operates an electronic calculator.

PERFORMANCE OBJECTIVE:

CONDITIONS: Given 30 mathematical problems including percentages, and an electronic calculator,

EVALUATION: determines the answers to the problems,

STANDARD: within the timeframe set by the instructor.

STUDENT LEARNING EXPERIENCES:

1. Operate an electronic calculator by touch.
2. Maintain the calculator including changing ribbons.
3. Perform addition, subtraction, multiplication, division, and percentage problems using the calculator.

SUGGESTED INSTRUCTIONAL TECHNIQUES:

1. Invite a guest to demonstrate proficiency using touch operation of an electronic calculator.
2. Assign students to compare interest at a local car dealer, bank, and credit union and calculate savings on lowest rates.

INSTRUCTIONAL EQUIPMENT, MATERIALS, AND SUPPLIES:

1. Electronic calculator and math problems.

RESOURCES:

Briggs, J. Robert, and Eugene J. Kosy. ELECTRONIC CALCULATORS & OFFICE MACHINES WITH BUSINESS MATH APPLICATIONS AND SIMULATION. South-Western Publishing Company, Cincinnati, OH. 4TH ED. 1984.

Pasevark, William R. ELECTRONIC DISPLAY CALCULATOR. South-Western Publishing Company, Cincinnati, OH. 2ND ED. 1984.

3.0 **COMPETENCY/SKILL:** Uses office equipment to complete job tasks.

3.3 **TASK:** Operates a copier.

PERFORMANCE OBJECTIVE:

CONDITIONS: Given access to a copier and material to be copied,

EVALUATION: reproduce 3 copies,

STANDARD: which are clear, sharp, clean and legible.

STUDENT LEARNING EXPERIENCES:

1. Identify the capabilities and functions of a copier.
2. Describe the procedures for correcting minor malfunctions of a copier.
3. Produce sharp clear legible copies.
4. Understand copyright laws.

SUGGESTED INSTRUCTIONAL TECHNIQUES:

1. Invite a copier sales representative to discuss current office copier cababilities.

INSTRUCTIONAL EQUIPMENT, MATERIALS, AND SUPPLIES:

1. Photocopier.

2. Information sheet, end of this unit, and copyright laws.

RESOURCES:

ARIZONA BUSINESS OCCUPATIONS COMPETENCY-BASED CURRICULUM GUIDE. Arizona Department of Education, Phoenix, AZ. Pages R/D 8-10. 1980-81.

Fulton, Patsy J., Joanna D. Hanks, J. Sargeant Reynolds. PROCEDURES FOR THE PROFESSIONAL SECRETARY. South-Western Publishing Company, Cincinnati, OH. 1985.

Kupsh, Joyce, and Sandra Whitcomb. THE ELECTRONIC OFFICE. Glencoe Publishing Company, Encino, CA. Date unavailable.

Moon, H. R. OFFICE PROCEDURES AND TECHNOLOGY. MPC Educational Publishers, Bronx, NY. Date unavailable.

Pasewark, William R. REPROGRAPHICS: COPIER, OFFSET, STENCIL, FLUID. South-Western Publishing Company, Cincinnati, OH. 3RD ED. 1984.

Quible, Zane K. ADDMINISTRATIVE OFFICE MANAGEMENT: AN INTRODUCTION. Reston Publishing Company, Reston, VA. 3RD ED. 1984.

Tedesco, Eleanor H. ADMINISTRATIVE OFFICE MANAGEMENT: THE ELECTRONIC OFFICE. John Wiley & Sons, Inc., New York, NY. 1984.

DUPLICATING MATERIALS ON A COPYING MACHINE

COPYING MACHINES, sometimes referred to as photocopiers or simply copiers, provide a fast and easy way to reproduce an exact copy of an original. The speed and ease associated with using a copying machine is partly a result of being able to use an already-existing document, thereby reducing any other preparation activities. Also, most copying machines (when used properly) produce a very clear and high quality reproduction of an original, even when a large volume of copies is required.

The two most common types of copying machines are PLAIN PAPER COPIERS (which require paper treated with special chemicals). A plain paper copier is generally more expensive than a coated paper copier, but paper supplies are less expensive. Copiers also vary according to speed, low or high volume capacities, and automated features or capabilities.

Automated features available on some copiers to speed the duplicating process include such items as an automatic document feed option, a collating function which sorts multi-page documents, a reduction feature to reduce the print on a document, a duplexing function which allows you to copy material on both sides of a piece of paper, and even a stapling feature that staples the collated documents. Since there are such a variety of copiers and capabilities that can be included on a copier, it is wise to study the specific instruction manual for the copier thouroughly and observe someone using the copier before use.

Most organizations include a "request form" along with the materials to be duplicated. The request form allows the individuals requesting the work done to give specific instruction such as the number of copies to be made, type or color of paper to use and whether material should be recuded, printed on both sides, collated, etc. Pay special attention to instructions to avoid excessive use of the copier since it is relatively expensive to use. Also, be aware of laws prohibiting coping of certain protected materials.

Once you are familiar with the copier's functions and capabilities and you have revieved the copying instructions for the materials to be duplicated, you are ready to perform the quick and simple procedures required to duplicate the materials.

*SECRETARIAL OCCUPATIONS V-TECS GUIDE.

REPLICATING MATERIALS

Another method of producing multiple copies is by using carbon paper inserted between pages as you type. Carbon copies provide a very cost efficient and simple way of preparing multiple copies, but the use of this method has decreased due to the widspread use of the copier. This process is often used when typing correspondence so that the employer will have an exact copy of the letter or memorandum sent to the addressee. When making several carbon copies at once, be sure to adjust the impression regulator on the typewriter to the appropriate thickness of the pack. Check the carbon copies as you type to be sure that all copies are legible and error-free.

*SECRETARIAL OCCUPATIONS V-TECS GUIDE.

COLLATING MATERIALS

After multipage materials have been duplicated, it is necessary to collate the materials to correspond with the master set. To COLLATE means to assemble or arrange a number of pages together in a specific order. The collating process may be done manually by simply placing the individual stacks of pages on a table or in a HAND COLLATING DEVICE (which is an expandable device containing approximately 18 bins) and lifting the top page from each stack until all pages are assembled. This procedure is satisfactory when collating a limited number of pages; however, when a large volume of pages are to be collated, this method takes much time and is very tiring.

Whenever a large volume of pages must be collated, it is wise to use an AUTOMATIC COLLATOR, which is a machine that mechanically assembles the pages in the desired order. Automatic collators are much faster and contain hundreds of collating bins. Many automated collators also include special features such as jogging (shaking lightly to align pages) and stitching (a way of fastening) the collated sets. The specific operating instructions for an automated collator will differ among various brands and types.

An automated collating feature is also available with many duplicators and copiers. This feature is very time-saving because the pages are automatically collated as they are duplicated and there is no need to physically remove the copies from the copier into a separate collating device. Duplicators and copiers with this feature, as well as automatic collators, allow the office worker to spend less time collating a large volume of pages and more time performing more interesting and important tasks.

*SECRETARIAL OCCUPATIONS V-TECS GUIDE.

4.0 **COMPETENCY/SKILL:** Applies principles of records filing.

4.1 **TASK:** Indexes, codes, sorts, and files documents for alphabetic, numeric, subject, chronological, and geographical filing.

PERFORMANCE OBJECTIVE:

CONDITIONS: Given 5 index cards with names and addresses, 5 business letters, 5 interoffice memorandums, and 5 purchase orders,

EVALUATION: indexes, codes and arranges cards in alphabetical order, the letters in subject order, the memos in chronological order, and the purchase orders in numerical order,

STANDARD: with 100 percent accuracy.

STUDENT LEARNING EXPERIENCES:

1. Review rules for alphabetic, numeric, subject, chronological, and geographic filing.
2. Index and code correspondence to be filed.
3. Sort documents, file documents.
4. Type addresses, file folders, file drawer labels, and index cards.

SUGGESTED INSTRUCTIONAL TECHNIQUES:

1. Make arrangements with school personnel to take a field trip on campus to view all systems where records are kept on students and teachers. This may include a visit to guidance, nurse's office, attendance office, principal's office, etc.

   HINT: Have class discussion first to allow students to suggest where records may be kept.

2. Use a telephone directory to compare alphabetic and subject systems.

3. Prepare a handout sheet with the four basic filing systems and examples of each on the top half and drills for each on the lower half. Complete drills orally as a class.

4. After explaining indexing and discussing alphabetic filing rules, have student index names of allstudents in the class.

   HINT: Call off names of students at random and have students write each name on a 3" x 5" index card of paper cut to size. Be sure to include a middle initial or name.

5. Put the index cards prepared in the above activity in alphabetical order.

6. From the telephone directory (or other source) have students select a minimum of 21 company names--at least three in each letter grouping (i.e. Blaine, Boatch, Brook). After writing or typing (double spaced) each name on a sheet of paper, have students index each name and then type or write an alphabetical listing.

INSTRUCTIONAL EQUIPMENT, MATERIALS, AND SUPPLIES:

1. Telephone books, index cards, U.S. map.

2. Information sheet, end of this unit.

RESOURCES:

Fosegan, Joseph S. ALPHABETIC INDEXING RULES--APPLICATION BY COMPUTER. South-Western Publishing Company, Cincinnati, OH. 1984.

Fulton, Patsy J., Joanna D. Hanks, J. Sargeant Reynolds. PROCEDURES FOR THE PROFESSIONAL SECRETARY. South-Western Publishing Company, Cincinnati, OH. 1985

Holmes. FILING MADE EASY A FILING SIMULATION. Houghton Mifflin Company, Boston, MA. 2ND ED. 1985.

Kutie, Rita C., and Virginia R. Huffman. THE WILEY OFFICE HANDBOOK, John Wiley & Sons, Inc., New York, NY. 2ND ED. 1984.

Rosen, Arnold, Eileen Feretic, Margaret H. Bahniuk. ADMINISTRATIVE PROCEDURES FOR THE ELECTRONIC OFFICE. John Wiley & Sons, Inc., New York, NY. 2ND ED. 1985.

Sabin, William A. THE GREGG REFERENCE MANUAL, Gregg/McGraw-Hill Book Company, Novato, CA. 6TH ED. 1985.

4.0 **COMPETENCY/SKILL:** Applies principles of records filing.

4.2 **TASK:** Maintains filing system.

PERFORMANCE OBJECTIVE:

CONDITIONS: Given a list of documents with dates and description,

EVALUATION: identifies documents to be stored, purged, destroyed.

STANDARD: Correctly identify methods of storage, items to be purged, and methods of destroying records.

STUDENT LEARNING EXPERIENCES:

1. Identify classes of records, important, essential, critical.
2. Sort documents according to classifications.
3. Define methods of destroying each classification of record.
4. Discuss methods for long-term storage and purging of stored documents.

SUGGESTED INSTRUCTIONAL TECHNIQUES:

1. Divide the class into groups of four. Distribute to each group; samples of letters, memos, invoices, purchase orders, checks, etc. and have them set up an appropriate filing system using one folder with guide cards. Then have each group prepare a list of the items in their file and post (names of students on list for group identification) for all students to use or else make one copy for each group.

   HINT: Samples of materials to distribute may be obtained from typing classes, completed practice sets, etc. Check with other business teachers for discarded materials.

2. Discuss the various procedures used for borroving materials from files. Have available "Requisition Sheets" and "Out Guides" (refer to samples in textbook to prepare master for copies) for students to use in checking out and returning material from the files prepared in the above activity.

   HINT: Allov only 15 minutes of four class periods for borroving, returning, and reserving materials. Materials, checked out on the fourth day could be returned at the beginning of the fifth day. Assign each student to be in charge of their group's file one day only. At the beginning of the fifth day each group will check their file against the list prepared earlier to verify that all materials have been returned.

INSTRUCTIONAL EQUIPMENT, MATERIALS, AND SUPPLIES:

1. Sample documents which are critical, important, essential.

RESOURCES:

See Task 4.1.

PREPARING RECORDS FOR FILING

An efficient filing system begins before records are placed in file containers. A definite procedure should be established by every business for regular, reliable collections of all documents that need to be filed. This procedure should be followded regardless of the size of the organization and whether the files are kept at individual work stations or in a cental filing department.

Before incoming correspondence reaches the filing department of the large organization, it has passed through at least two other departments--the mail department, which places a time stamp on the correspondence when the mail is opened; and the department to which the correspondence is routed, where the person handling the correspondence places a release mark on it when it is ready for filing. The TIME STAMP records the date and sometimes time of receipt of each piece of correspondence, and serves as a check on the time that elapses before a reply is sent. The initials or rubber stamp mark of the RELEASE MARK show that a document has been handled and gives the authority to file the document.

Once a record is released for filing, there are five steps involved in the preparation of records for filing: inspecting, indexing, coding, cross-referencing, and sorting. The first step in the filing process is INSPECTING each document to be filed. In addition to checking for release marks, you should inspect records for completeness. Examine all documents clipped or pinned together and, if they belong together, staple them. Paper clips, rubber bands, pins, etc. should not be placed in the file drawer. Torn or damaged papers should be mended with tape, and oddly shaped or undersized papers should be glued or taped to a regular sheet.

INDEXING is the process of determining the caption under which each document will be filed. You should scan or read each document carefully to determine the key name or title that best identifies the material for alphabetical and/or subject filing; refer to the index file to determine what code to assign a paper for numeric filing; determine both the location and the individual name by which a paper will be filed by geographic location.

After deciding how a document should be filed, mark the indexing caption on the document. This CODING process can be done by underlining it with a colored pencil, circling the caption, or writing the caption or code in a prominent place on the paper. The code on the document should be complete enough to enable you to return it to the same folder each time it is retrieved.

The next step, when necessary, is CROSS-REFERENCING. Whenever a document may be requested in two or more different ways, it should be filed under the most frequently used caption and cross-referenced under the others. (See Informations Sheet for Task 5 for more information regarding cross-referencing.)

SORTING is the process of arranging documents in alphabetic (or numeric) order after they have been coded. This speeds up the process of actually placing the correspondence or records in the files. If there are many documents to be filed, make one or more rough prelininary sorting. Sort documents into rough divisions such as A-F, G-M, N-T, U-Z (or similar numeric divisions). Then, fine sort each stack into exact order for filing.

SUBJECT NUMERIC FILING involves assigned numbers to subject headings, thus combining subject and numeric filing systems. Some common subject numeric filing arrangements in use include simple-numeric, decimal-numeric, and duplex-numeric systems.

Similarly, ALPHANUMERIC SYSTEMS combine letters and number for filing purposes. Examples include drivers' license numbers, automobile registrations (serial numbers), license plate registrations, and insurance policies.

PHONETIC CLASSIFICATION SYSTEMS have been designed to overcome the difficulty of retreiving files in which names sound alike, but are spelled differently. These systems use codes that represent key letter sounds, and are used primarily by organizations maintaining large volumes of records filed by name.

Another variation of the numeric system is CHRONOLOGICAL FILING, an arrangement of records according to time sequence. Records are filed by years, months, days and/or other similar time divisions. Examples of records that are filed chronologicaly are newspapers and county records of births, deaths, marriages, etc. Chronological filing may be used by itself, in combination with other filing systems (alphabetic, numeric, subject, and geographic) or in a supportive capacity to remind individuals of important dates, appointments, or future needs.

Numeric filing systems can help an organization handle rapidly groving files; increase speed and accuracy in filing, finding, and refiling records; decrease errors resulting from duplication of names; reduce lengthy captions expressed as vords; and increase success efficiency when integrated with computer systems. It is also quite helpful and efficient to keep confidential records by number, which conceals the names of the people involved from vorkers who handle the files, and makes it extremely difficult to locate a file without the register of file names.

*SECRETARIAL OCCUPATIONS V-TECS GUIDE.

ALPHABETIC FILING

Most office filing uses alphabetical sequencing to file correspondence and client materials. The alphabetic system is the arrangement of names or other captions in order from A to Z in A-B-C fashion--The same sequence used in dictionaries and telephone directories.

Because there is no need to consult a related index when locating an item, alphabetic filing is considered a DIRECT ACCESS SYSTEM. Although the simplicity of the ABCs makes it easy to file and retrieve materials, this is true only if clearly defined rules are followed to insure standardization. Several sources may be consulted for the purpose of determining procedures and rules regarding alphabetic indexing. Since options vary as to the number of fundamental rules which can be applied, be sure to use those rules taught by your instructor or those standardized by your employer.

Some variations of the straight alphabetic filing method include name filing, subject filing, and geographic filing.

CLASSIFICATION BY NAME would include the names of individuals, organizations, businesses, industries, governmental agencies, geographic locations, etc. In order to file names correctly, your must select the caption under which the record is to be filed. Names of individuals are usually filed under the last name, while business names are filed by the first main word in the name. For example, how would you file "Mary's Flower Cart" as opposed to "Mary Flower CARTE"? Defined rules must be followed for uniform procedure.

CLASSIFICATION BY SUBJECT involves grouping related material under major headings. The subject method of filing is discussed in more detail in the Information Sheet regarding Subject Filing.

GEOGRAPHIC CLASSIFICATION systems are alphabetic in nature, but arrange records according to location first, and then by name or subject. Some businesses conduct and control their operations according to districts or regions, and may organize their records in this manner. Real estate firms, governmental agencies, and public utilities also may find it advantageous to use a geographic filing system.

Primary divisions can be arranged according to state, branch office, foreign country, or any geographic territory that the business functions under. Papers are always classified first by the largest division. For example, if the classification is by states, papers are classified first by states, then by cities within each state, and last according to the names of each file within each city. Further classifications can be made if necessary, such as street, lot number, etc.

*SECRETARIAL OCCUPATIONS V-TECS GUIDE.

SUBJECT FILING

It is sometimes more efficient for an organization to file by subject rather the alphabetically. Classification by subject involves grouping related material under major headings, or by topic rather than by letters of the alphabet.

A good example of the subject filing method is the yellov pages of your tlephone directory. This arrangement makes it possible to look for a business or organization according to the type of goods or kind of services it provides. For example, under the heading "Automobile Dealers", all car dealers will be listed, even though they sell different models and the individual names might be "Atvood Used Cars" or "Wallace Motors". From these listings under the main heading, you choose the individual dealers you wish to contact for your specific need.

Another example of subject filing would be the listing of items in a department store. A toaster would be found in the "Appliance Department" rather the a "T" location. You would look at the store's directory to find where the particular department is located.

Subject filing would most likely be used in these instances:

1. the information is called for by subject;
2. the papers do not refer to a person or an organization;
3. it is advantageous to have all the papers about one subject together, so that all of the records about one activity or product can be obtained immediately from the files;
4. when records would otherwise fall into minute subdivisions (when the volume of correspondence from individual correspondents might be small, but hundreds of alphabetic files would have to be set up to list them all; correspondence may be filed by subject, with only an alphabetic card index needed to maintain a list of all correspondents per subject).

The basic process of inspecting, indexing and coding, sorting, and storing remains unchanged in subject filing, so they are quite similar to those used in alphabetic filing. However, because subject files must meet the requirements of each individual organization, it is unlikely that any two subject files would ever be organized in exactly the same manner.

A subject file can follov either a DICTIONARY ARRANGEMENT (strict alphabetical order without divisions or subdivisions), an ENCYCLOPEDIC ARRANGEMENT (major headings with divisions and subdivisions), or be combined with numbers. Anyone who designs a subject filing system for an organization must knov that organization thoroughly in order to envision all the main heading, divisions and subdivisions that are needed for efficient filling and retrieval.

A subject file must be controlled by an index that lists all subjects used in the system, so it is an INDIRECT ACCESS SYSTEM. Because an item may be listed under several categories, extensive cross-referencing may be necessary, and locating a file may be more difficult than alphabetic filing. The SUBJECT INDEX should contain a list of all main subject headings, major divisions, and subdivisions, and should serve as a guide for coding and locating papers. This list may be typed on a sheet of paper or on cards. A card index should also include cross references.

*SECRETARIAL OCCUPATIONS V-TECS GUIDE.

NUMERIC FILING

With the widespread use of data processing systems for repetitive and statistical operations in many organizations, numbers have become increasingly important in identifying some records. Records that are frequently identified by number and filed numerically include insurance policies, purchase requisitions, sales order, contracts, licenses, bank's accounts, and credit card accounts, although any type of record can be assigned a number and filed numerically if desired.

For example, a university may assign students identification numbers or use pre-established identification such as social security numbers. Many large government agencies use numeric systems, such as the Social Security Administration, the Veterans Administration, and state motor vehicles bureaus.

A NUMERIC FILING SYSTEM has four parts:

1. the main numeric file;
2. a book called a register, accession record, or acquisition book, which is a list of all file numbers that have already benn assigned;
3. an alphabetic card index;
4. a miscellaneous alphabetic file for correspondence.

In numeric filing, records are filed consecutively by number, and numbers are assigned to papers in sequential order. To prevent assigning one number to two correspondents, a list of numbers already assigned (register) is consulted. The captions on the guide tabs and on the folder tabs are all numbers.

Numeric filing is called an INDIRECT SYSTEM because you must refer to an alphabetic index to determine the number assigned to an individual correspondent in order to code and file a paper, or to retrieve a record. This index must be accurate and kept up to date. When the system is controlled manually, the name of each file is typed in index order on the first line of a file card and the number is typed in the upper-right corner. The name and address of the person or organization is typed below in regular order. The cross-references of a numeric system are also kept on cards and filed in the index.

The basic numeric systems include: straight numeric, terminal-digit numeric, middle-digit numeric, and subject numeric. In STRAIGHT NUMERIC FILING, consecutively numbered folders are arranged in the file in sequential order. This system is usually used for papers that are already numbered, such as checks, vouchers, insurance policies, purchase orders, etc.

In TERMINAL-DIGIT FILING, the digits are put into three groups. The final group is the drawer number, the middle group is the guide number, and the first group is the folder number. In MIDDLE-DIGIT FILING, the middle group is the drawer number, the first group is the guide number, and the final group is the folder number. Using these methods, incoming materials will be scattered throughout the drawers and retrieving will occur throughout the files instead of only at the end. Patented terminal and middle-digit filing systems are available which also add color coding to increase accuracy in filing.

*SECRETARIAL OCCUPATIONS V-TECS GUIDE.

FILING TERMS

ACTIVE RECORDS - current records of an organization that are referred to often and must be readily accessible.

ARCHIVES - permanent storage locations where the records of an organization are kept for historical, legal, or other reasons.

CAPTION - the title of a record--the name, subject, number, etc.--that appears on the label or tab of a guide, folder, or file container.

CHARGE-OUT SYSTEM - a procedure used to request and account for records that are removed from the files.

CLASSIFYING - mentally determining the name, subject, or number by which a specific document is to be filed. Another word for classifying is INDEXING.

CODING - making an identifying mark (underlining, circling, checking, etc.) on the document to be stored in order to indicate what classification it is to be filed under. When a record is removed from the files, it does not need to be reclassified for filing, because the original code stays on the paper.

CROSS-REFERENCE - another name or caption under which a record may be requested. A cross-reference notation is put into the file in a secondary location to direct the filing worker to the needed material at its actual location.

DIRECT ACCESS SYSTEM - a filing system that permits you to go directly to the files and locate a record without first referring to an index.

DISPOSAL - eliminating or destroying a record no longer needed in the files. Another word commonly used for this procedure is DISCARDING of records.

DISPOSITION - the final fate of a record.

FILING - a system of classifying, coding, arranging, and storing business records in an orderly manner so that they can be located quickly and easily when needed.

FILING SYSTEM - an arrangement of filing supplies and equipment that permits the storing of records according to a definite plan.

FILING WORKER - an employee whose specialized job is to inspect, classify, code, sort, and store records and to retrieve these records when needed.

FOLDER - the container in which papers or materials are kept in a file drawer, commonly made from manila, plastic, or pressboard.

GUIDES - stiff pieces of cardboard or other material that divide a file drawer into sections, serve as markers to aid in the quick location of records, and provide support for the folders. PRIMARY GUIDES mark the major divisions in the filing system, such a A, B, C, etc. SECONDARY GUIDES subdivide the primary sections into smaller groups of folders, such a Ba, Bi, Bo, Brown, etc.

HANGING FOLDER - folders with hangers that extend to the left and right from the top edge of the folder which hook into rails that run down the sides of a file drawer. The hangers keep folders in an upright position and prevent them from sliding down into the drawer. These folders may also be called SUSPENDED FOLDERS.

INACTIVE RECORDS - records that are seldom referred to that are stored in a less expensive storage area outside the immediate office filing area.

INDEX - a list of all the file titles found in a filing system, such as an alphabetic list of all the headings and subheadings in a subject file or a listing of all codes (numbers, alphanumeric codes, etc.) and their corresponding file names. All cross-reference listings are found in the index.

INDEXING - the mental process required to determine the caption under which a record should be filed (see classifying).

INDEXING UNITS - the names, initials, or words used in determining the alphabetic order of filed materials. For example, the name Janice E. Bona has three indexing units: Bona is the first; Janice is the second; and E. is the third.

INDIRECT ACCESS SYSTEM - a filing system in which you must refer to an index before records can be found, such as a numeric or subject system.

LABEL - a piece of gummed paper that is put on the tab of a folder; the name of the folder is typed on this label to identify the contents of the folder. Labels may be obtained in various colors and styles which may aid in the proper filing of materials.

LOG (BOOK) - a notebook containing records of important business transactions. In filing, a log is used to record charges and returns of material from the files. A log is also used in numeric filing to record numbers assigned to files.

OUT GUIDE - a guide used to indicate that an entire folder has been removed from the files. On this guide is recorded the name of the file, name of person who has the file, and the expected date of return.

RECORDS CONTROL - the procedures and systems used to make filing a reliable and systematic process.

REGISTER - used in numeric filing, the list of all correspondents and their assigned file numbers. The register is also referred to as an ACCESSION RECORD or ACQUISITION BOOK.

RELEASE MARK - a notation which indicates that a document has received the attention necessary and is ready for filing.

REQUISITION FORM - a standard form used to request in writing material that is in the files.

RETENTION - the period of time designated for keeping a particular record in the files.

RETENTION SCHEDULE - list of all kinds of records kept, where they should be kept, the length of time they must be saved, and when they should be destroyed.

RETRIEVE - find information in the files and physically remove the desired papers or copy the information needed.

SCORE - an indented or raised line near the bottom edge of a folder. By creasing a folder along the various score lines, you may allow for expansion of the folder's contents.

SORTING - the process of arranging records in alphabetic (or other) order after coding to get them ready for filing.

SUBSTITUTION CARD - a card used to replace papers removed from a file folder and to indicate the borrower's name and department.

SYSTEM - a series of related steps followed in accomplishing a major office activity such as filing. A PROCEDURE is a series of related substeps that are preformed to carry out part of a system.

TAB - the protion of a guide or folder that extends above its regular height and holds the caption that identifies the contents of the folder. The width of the tab is called its CUT; the location of the tab is its POSITION.

TICKLER FILE - a follow-up file that is usually arranged chronologically (by date) and serves to remind you of important dates, such as when a file is due back into the files or the date a file has been reserved for use by a particular person in the organization.

TRANSFER - the systematic removal of materials from the active records file to the inactive or other file.

5.0 **COMPETENCY/SKILL:** Uses references materials in completing job tasks.

5.1 **TASK:** Uses telephone directories.

PERFORMANCE OBJECTIVE:

CONDITIONS: Given a telephone directory containing yellov pages, and a list of items to purchase and services needed,

EVALUATION: locates and lists names and phone numbers of suppliers for each,

STANDARD: with 100 percent accuracy.

STUDENT LEARNING EXPERIENCES:

1. Become familiar with all types of information available in the telephone directory.

2. Practice locating names and numbers of individuals, firms, product suppliers, services, government agencies, schools, and non-governmental institutions.

3. List frequently called numbers in the reference section of the directory.

4. Locate emergency numbers in directory.

5. Locate area codes, time zones, sample rates, street maps.

SUGGESTED INSTRUCTIONAL TECHNIQUES:

1. Provide each student with a telephone directory. These can be collected by having the students bring in their old telephone directories.

2. Explain the importance of knowing alphabetic rules when using a directory.

3. Call out names, products, or services to be looked up in the directory. Give a point to the first student to find the telephone number. Keep track of points obtained by each student. Have a "Telephone Champion" for the day.

   HINT: If you live in a small community, try to obtain telephone directories from one of the larger cities. It is essential that students learn about larger city directories because of the mobility of the population.

4. Name the various items which can be found in the telephone directory. List the items on the board for class discussion.

5. Duplicate a yellow page and a white page with several names or groups out of order. Have students identify the item incorrectly listed and indicate where these items should be listed.

6. Explain the necessity of keeping a personal telephone directory of most-used numbers in an office. Have each student prepare a personal directory. The Telephone Company provides books for personal directories.

7. Prepare a bulletin board displaying pictures of the various kinds of files used to store frequently needed numbers and include samples of the yellow and alphabetic pages.

INSTRUCTIONAL EQUIPMENT, MATERIALS, AND SUPPLIES:

1. Telephone directories.

RESOURCES:

Moon, H. R. OFFICE PROCEDURES AND TECHNOLOGY. MPC Educational Publishers, Bronx, NY. Date unavailable.

Rosen, Arnold, Eileen Feretic, Margaret H. Bahniuk. ADMINISTRATIVE PROCEDURES FOR THE ELECTRONIC OFFICE. John Wiley & Sons, Inc., New York, NY. 2ND ED. 1985.

USING REFERENCE SOURCES. National Instructional Systems, Inc. Date unavailable.

5.0 **COMPETENCY/SKILL:** Uses reference materials in completing job tasks.

5.2 **TASK:** Uses and maintains company directory, city directory, and a zip code directory.

PERFORMANCE OBJECTIVE:

CONDITIONS: Given sample directories and a list of 20 items of information to be found,

EVALUATION: locates information and lists sources/answers,

STANDARD: with 90 percent accuracy.

STUDENT LEARNING EXPERIENCES:

1. List items to be found in company directory, city directory and zip code directory and practice locating information in each directory.

SUGGESTED INSTRUCTIONAL TECHNIQUES:

1. Collect company policy manuals from businesses, cities, and post office.

2. Discuss ways of determining the best reference to be used for a given situation.

3. Plan a treasure hunt in which students look for a variety of items using reference materials.

INSTRUCTIONAL EQUIPMENT, MATERIALS, AND SUPPLIES:

1. Sample company policies manuals, zip code directory, city directory.

2. Information sheet, back of this unit.

RESOURCES:

See Task 5.1.

5.0 **COMPETENCY/SKILL:** Uses reference materials in completing job tasks.

5.3 **TASK:** Uses dictionary, atlas, maps, and timetables.

PERFORMANCE OBJECTIVE:

CONDITIONS: Given a dictionary, atlas, and timetable, and a list of questions,

EVALUATION: locates information, records answer and source,

STANDARD: with 90 percent accuracy.

STUDENT LEARNING EXPERIENCES:

1. Identify types of information found in each reference source.
2. Practice locating geographic locations from the news in the atlas.
3. Plan a trip using an airline time schedule.

SUGGESTED INSTRUCTIONAL TECHNIQUES:

1. Divide class into teams of 3 or 4 and give them a list of information to be found.
2. Bring in the newspaper and have students locate places on the map.

INSTRUCTIONAL EQUIPMENT, MATERIALS, AND SUPPLIES:

1. Dictionary, atlas, map.

RESOURCES:

See Task 5.1.

5.0 **COMPETENCY/SKILL:** Uses reference materials in completing job tasks.

5.4 **TASK:** Keeps telephone numbers and addresses necessary for emergencies in a convenient place for quick reference.

PERFORMANCE OBJECTIVE:

CONDITIONS: Given a local telephone directory, a format for a receptionist telephone book, and a list of 10 hypothetical emergencies,

EVALUATION: prepare the receptionist telephone book,

STANDARD: with all pertinent numbers and information in an organized, legible manner.

STUDENT LEARNING EXPERIENCES:

1. Complete the receptionist's telephone book with numbers and addresses necessary for emergencies to frequently called numbers.

2. Collect representative office telephone numbers.

SUGGESTED INSTRUCTIONAL TECHNIQUES:

1. Prepare a blank receptionist's telephone book.

2. List most frequently needed numbers.

INSTRUCTIONAL EQUIPMENT, MATERIALS, AND SUPPLIES:

RESOURCES:

See Task 4.1.

MAINTENANCE OF MANUALS

A manual is a valuable tool that an organization can use for communicating management decisions to employees and nonemployees. A manual can be especially useful for:

1. training employees;
2. providing an on-the-job reference guide;
3. guiding employees when procedures are revised;
4. clarifying organizational structure and policies;
5. providing uniformity in interpretation and implementation of policies and procedures;
6. reviewing and improving policies and procedures.

Manuals may be used by either internal or external users. Internal manuals are used by employees within an organization, and deal with company philosophy, policies, and procedures; departmental functions and procedures; personnel policies and benefits; or technical working procedures. External manuals are designed for use outside of the organization by clients, customers, distributors, service organizations, manufacturer representatives, franchisees, and other outside consulting organizations. For example, a customer manual might provide instructions for the assembly, use, and maintenance of a product manufactured by the organization.

There are five basic types of manuals: organizational manuals, policy manuals, procedures manuals, functional manuals, and desk manuals. The ORGANIZATIONAL MANUAL (or company manual) provides information about the organization itself and information about the functions of each of its departments or divisions. Historical information, information about the organization's products or services, and an organizational chart are usually included. The organizational manual can be used for the orientation of new employees, providing prospective employees with information about the organization, and providing interested parties with reference materials about the organization.

Policies are basic guides to action that establish general rules governing company conduct, and furnish the background for understanding the reasons for managerial decisions. A POLICY MANUAL provides a written record of the policies by which the organization operates. Policy manuals often contain two levels of policies: those that govern organization-wide actions and those that govern the actions of individuals within the organization.

The PRODEDURES MANUAL outlines existing procedures for performing various work processes, and contains detailed explanations of the steps involved in each task. By putting such procedures into a manual, they are usually simplified and made as efficient as possible. Employees can easily use the procedures manual when they must perform unfamiliar tasks, and supervisors or other employees do not have to spend time helping them.

FUNCTIONAL MANUALS usually contain information about one specialized area or function within the organization. For example, a filing manual would outline the filing rules used by the organization; correspondence or typing manuals would specify the proper format for letters, memos, envelopes, reports, minues of meetings, and other kinds of office typing.

The DESK MANUAL is not an official publication of the organization, but is the reference tool put together by one employee relating to his/her particular job. Typical information that might be included in your desk manual includes: procedures for completing work processes not contained in the procedures manual; copies of form letters used; examples of forms commonly used in your job; important days to remember; names and addresses of individuals with whom you or your employer frequently deal; instructions for processing certain forms; style guidelines for certain documents; and any other information you feel would be helpful.

Since much time and money are invested in the development of manuals, provision must be made to keep the manuals up-to-date. You may receive revisions from time to time that should be reflected in your manual(s). Words, sentences, pages, or entire sections may be changed, deleted, or added. You must be careful to make these changes correctly, revising page numbers and table of contents as necessary. A loose-leaf, ring-binder format is usually chosen for manuals, facilitating the easy removal of outdated material and the addition of updated sheets.

A thorough review of each manual should be made at least every three years. Manuals can be combined for easier use (such as the policies and procedures manuals, or procedures and desk manuals) as long as control is maintained.

*SECRETARIAL OCCUPATIONS V-TECS GUIDE.

6.0 **COMPETENCY/SKILL:** Organizes work area.

6.1 **TASK:** Keeps the reception area neat throughout the day.

PERFORMANCE OBJECTIVE:

CONDITIONS: Given the assignment to serve as receptionist for the classroom,

EVALUATION: keeps area organized and neat,

STANDARD: according to standards established by the instructor.

STUDENT LEARNING EXPERIENCES:

1. Arrange the reception area of the classroom to make a favorable impression on the classmates and visitiors.

2. Arrange reference materials and reading materials for users.

SUGGESTED INSTRUCTIONAL TECHNIQUES:

1. Role play by having student serve as receptionist. Invite a faculty member to visit and observe the classroom entrance area.

INSTRUCTIONAL EQUIPMENT, MATERIALS, AND SUPPLIES:

RESOURCES:

Fruehling, Rosemary T., and Constance K. Weaver. ELECTRONIC OFFICE PROCEDURES. Gregg/McGraw-Hill Book Company, Novato, CA. 1987.

Kutie, Rita C., and Joan L. Rhodes. SECRETARIAL PROCEDURES FOR THE ELECTRONIC OFFICE. John Wiley & Sons, Inc., New York, NY. 2ND ED. 1986.

Luke, Cheryl M., and C. B. Stiegler. OFFICE SYSTEMS AND PROCEDURES. Houghton Mifflin Company, Boston, MA. 1986.

Rosen, Arnold, Eileen Feretic, Margaret H. Bahniuk. ADMINISTRATIVE PROCEDURES FOR THE ELECTRONIC OFFICE. John Wiley & Sons, Inc., New York, NY. 2ND ED. 1985.

6.0 **COMPETENCY/SKILL:** Organizes work area.

6.2 **TASK:** Keeps desk neat and arranges for coverage of desk at all times.

PERFORMANCE OBJECTIVE:

CONDITIONS: Given the assignment to serve as receptionist for the classroom,

EVALUATION: arranges desk materials and supplies and makes provision for another student to cover the desk when necessary,

STANDARD: according to standards set by instructor.

STUDENT LEARNING EXPERIENCES:

1. Organize desk area with reference books, textbooks, and all supplies needed for an efficient receptionist.

2. Schedule the classroom reception area to arrange for coverage all day. They will establish time schedules and check student calendars to allow for continuous coverage.

SUGGESTED INSTRUCTIONAL TECHNIQUES:

1. Role play situations with each student serving as responsible receptionist for the day. Assign that student to ask other students to cover the desk while he/she is unavailable.

INSTRUCTIONAL EQUIPMENT, MATERIALS, AND SUPPLIES:

RESOURCES:

See Task 6.1

7.0 **COMPETENCY/SKILL:** Schedules appointments following company procedures.

7.1 **TASK:** Makes appointments requested by executive.

PERFORMANCE OBJECTIVE:

CONDITIONS: Given a list of 10 appointments, cancellations and/or additions and an appointment calendar,

EVALUATION: makes the appropriate appointments, notes them on executive calendar, receptionist calendar, and tickler file,

STANDARD: with 100 percent accuracy.

STUDENT LEARNING EXPERIENCES:

1. Read resource material.
2. Follow suggested steps for setting up appointments.
3. Record appointments on calendars and tickler files.
4. Use legible handwriting in all numbers, letters, and words.
5. Confirm appointments.

SUGGESTED INSTRUCTIONAL TECHNIQUES:

1. Discuss with the students the importance of being courteous and tactful when requesting appointments. Use a tape recorder to tape the students role-playing setting up appointments.

INSTRUCTIONAL EQUIPMENT, MATERIALS, AND SUPPLIES:

1. Information sheet, back of this unit.

RESOURCES:

Fruehling, Rosemary T., and Constance K. Weaver. ELECTRONIC OFFICE PROCEDURES. Gregg/McGraw-Hill Book Company, Novato, CA. 1987.

Kutie, Rita C., and Joan L. Rhodes. SECRETARIAL PROCEDURES FOR THE ELECTRONIC OFFICE. John Wiley & Sons, Inc., New York, NY. 2ND ED. 1986.

Luke, Cheryl M., and C. B. Stiegler. OFFICE SYSTEMS AND PROCEDURES. Houghton Mifflin Company, Boston, MA. 1986.

Rosen, Arnold, Eileen Feretic, Margaret H. Bahniuk. ADMINISTRATIVE PROCEDURES FOR THE ELECTRONIC OFFICE. John Wiley & Sons, Inc., New York, NY. 2ND ED. 1985.

7.0 **COMPETENCY/SKILL:** Schedules appointments following company procedures.

7.2 **TASK:** Makes appointments for others to see an executive.

PERFORMANCE OBJECTIVE:

CONDITIONS: Given a list of requests for appointments with an executive,

EVALUATION: checks executive calendar, tickler file, and reception file for openings, makes appointments,

STANDARD: with 100 percent accuracy.

STUDENT LEARNING EXPERIENCES:

1. Screen callers to determine need for appointment and follows company procedures for doing so.

2. Record appointments and cancellations.

3. Use legible and accurate handwriting in recording all numbers, letters, and words.

4. Record details of appointments immediately including date, time, person, place, subject, and phone numbers of persons making the appointment.

5. Record appointments on executive calendar after clearing.

SUGGESTED INSTRUCTIONAL TECHNIQUES:

1. Present resource materials discussing importance of following proper procedures.

2. Role play situations where students request an appointment with instructor.

INSTRUCTIONAL EQUIPMENT, MATERIALS, AND SUPPLIES:

1. Executive calendars, receptionist calendars, tickler files, telephone equipment (optional).

RESOURCES:

See Task 7.1

7.0 **COMPETENCY/SKILL:** Schedules appointments following company procedures.

7.3 **TASK:** Reschedules future appointments.

PERFORMANCE OBJECTIVE:

CONDITIONS: Given a list of appointment cancelations requested by an executive and by others wishing to change appointments,

EVALUATION: cancels and reschedules following company procedures,

STANDARD: with 100 percent accuracy.

STUDENT LEARNING EXPERIENCES:

1. Check calendar to verify existing appointment.

2. Check alternate time to see if executive calendar is clear.

3. Record details of appointments immediately including date, time, person, place, subject, and phone numbers of person making the appointment or of person with whom executive wishes to meet.

4. Use legible and accurate handwriting in recording all numbers, letters and words.

SUGGESTED INSTRUCTIONAL TECHNIQUES:

See Task 7.2.

INSTRUCTIONAL EQUIPMENT, MATERIALS, AND SUPPLIES:

See Task 7.2.

RESOURCES:

See Task 7.2.

APPOINTMENT CALENDARS

As an office worker, maintenance of your employer's APPOINTMENT CALENDAR may be one of your responsibilities. Normally, your boss will have a calendar and you will have a duplicate calendar in your work area. Some employers prefer a pocket calendar and often make some of their own appointments. In this case, you must arrange a mutually agreeable system for keeping the office calendar up-to-date.

To schedule appointments accurately and efficiently, you must be familiar with your employer's preferences. Determine the scope of your authority--should you confer with your employer before making firm appointment commitments? Does she/he prefer appointments in the morning or afternoon? Should you schedule appointments the day before and/or the day after your employer's out-of-town trips? Does she/he like to keep certain days or times open? Whatever your employer's preferences, keep them in mind when scheduling appointments.

Calendars may be used as a reminder for pre-scheduled organizational functions, company holidays and vacations, and approaching deadlines. It is also thoughtful to include personal reminders, such as birthday and anniversary dates, for your employer. When the end of the year approaches, you should begin a calendar for the coming year.

Sizes and styles of desk calendars vary. Hard-copy desk calendars are formatted on a monthly, weekly, or daily basis. Variations may include time slots that are broken down in hour, half-hour, or fifteen-minute segments.

Although appointments are most commonly recorded in calendars or logs, modern technology allows more and more executives to use computers and message-switching equipment to maintain their schedules. Appointments are keyboarded into the computer's memory and called forth via a terminal. This equipment may be used by one or more executive and their support personnel.

Two types of information are usually recorded in an appointment calendar: appointment data and supplemental information. By keeping the following points in mind, you will be better able to handle your boss's appointments in an efficient manner:

1. Remember to consider your employer's preferences when scheduling appointments.

2. Remain within your authority to make commitments.

3. Maintain calendar/schedule on a daily basis.

4. Prepare a daily listing of your employer's schedule if she/he requests it.

5. Assemble in advance any documents or related materials that your employer might need to conduct the meeting.

8.0 **COMPETENCY/SKILL:** Receives and places telephone calls.

8.1 **TASK:** Describes telephone services available and how they are used.

PERFORMANCE OBJECTIVE:

CONDITIONS: Given a list of 20 telephone services and 20 definitions,

EVALUATION: matches the definition with the service,

STANDARD: with 85 percent accuracy.

STUDENT LEARNING EXPERIENCES:

1. Keep sources of information about telephone services at hand for quick references (conference calls, credit card calls, call waiting, call forward, telecommunications, etc.)

2. Practice using these services on equipment available from the local telephone company.

SUGGESTED INSTRUCTIONAL TECHNIQUES:

1. Invite the local telephone company representative in to give a demonstration on the various services available.

2. Design role-playing situations for students to practice.

3. Take a field trip to large a company to see telephone services in operation.

4. Arrange for a conference call from one business class to another.

INSTRUCTIONAL EQUIPMENT, MATERIALS, AND SUPPLIES:

1. Telephone company materials listing services available.

2. Telephone simulation equipment.

3. Information sheets, back of this unit.

RESOURCES:

ARIZONA BUSINESS OCCUPATIONS COMPETENCY-BASED CURRICULUM GUIDE. Arizona Department of Education, Phoenix, AZ. Pages TT 8, 9, 20. 1980-81.

THE BUSINESS TELEPHONE, USING THE TELEPHONE. Prentice-Hall Media, Englewood Cliffs, NJ. Date unavailable.

8.0 **COMPETENCY/SKILL:** Receives and places telephone calls.

8.2 **TASK:** Places outgoing calls.

PERFORMANCE OBJECTIVE:

CONDITIONS: Given a situation requiring the placing of a person-to-person credit card call,

EVALUATION: places the call,

STANDARD: with acceptable ratings on all items as observed by the instructor.

STUDENT LEARNING EXPERIENCES:

1. Maintain list of frequently called numbers.
2. Check telephone directory or personal call list to avoid wrong numbers.
3. Gather all pertinent materials prior to call ie. calendar, notes, notepad.
4. Let telephone ring at least ten times to allow person being called to answer the phone.
5. Identify self.
6. Remember time differences when calling long distance.
7. Stay on line when placing a call.
8. Place emergency calls.
9. End calls courteously.

SUGGESTED INSTRUCTIONAL TECHNIQUES:

1. Plan a field trip to the local telephone company or call and request current films on telephone techniques.

2. Role play situations with simulation equipment.

INSTRUCTIONAL EQUIPMENT, MATERIALS, AND SUPPLIES:

1. Telephone simulation equipment, telephone directories, script for role playing, films available from telephone company.

RESOURCES:

ARIZONA BUSINESS OCCUPATIONS COMPETENCY-BASED CURRICULUM GUIDE. Arizona Department of Education, Phoenix, AZ. Pages TT 3-7, 16. 1980-81.

Fruehling, Rosemary T., and Constance K. Weaver. ELECTRONIC OFFICE PROCEDURES. Gregg/McGraw-Hill Book Company, Novato, CA. 1987.

Fulton, Patsy J., Joanna D. Hanks, J. Sargeant Reynolds. PROCEDURES FOR THE PROFESSIONAL SECRETARY. South-Western Publishing Company, Cincinnati, OH. 1985

Kutie, Rita C., and Joan L. Rhodes. SECRETARIAL PROCEDURES FOR THE ELECTRONIC OFFICE. John Wiley & Sons, Inc., New York, NY. 2ND ED. 1986.

Luke, Cheryl M., and C. B. Stiegler. OFFICE SYSTEMS AND PROCEDURES. Houghton Mifflin Company, Boston, MA. 1986.

Moon, H. R. OFFICE PROCEDURES AND TECHNOLOGY. MPC Educational Publishers, Bronx, NY. Date unavailable.

Rosen, Arnold, Eileen Feretic, Margaret H. Bahniuk. ADMINISTRATIVE PROCEDURES FOR THE ELECTRONIC OFFICE. John Wiley & Sons, Inc., New York, NY. 2ND ED. 1985.

THE BUSINESS TELEPHONE, USING THE TELEPHONE. Prentice-Hall Media, Englewood Cliffs, NJ. Date unavailable.

8.0 **COMPETENCY/SKILL:** Receives and places telephone calls.

8.3 **TASK:** Answers Telephone.

PERFORMANCE OBJECTIVE:

CONDITIONS: Given a role-playing situation and a telephone simulator,

EVALUATION: answers telephone,

STANDARD: promptly, courteously, and efficiently giving name of firm, own name with a pleasant voice.

STUDENT LEARNING EXPERIENCES:

1. Answer promptly and courteously identifying company and self.
2. Determine who is calling.
3. Follow company procedures when giving out information.
4. Handle wrong numbers efficiently.
5. Listen for specific information and repeats anything not clear.
6. End calls courteously.

SUGGESTED INSTRUCTIONAL TECHNIQUES:

1. Use prepared scripts for initial call simulations.
2. Play tape recordings of telephone calls and discuss strong and weak points.
3. See Task 8.2.

INSTRUCTIONAL EQUIPMENT, MATERIALS, AND SUPPLIES:

1. Telephone simulation equipment, scripts, and evaluation sheets.

RESOURCES:

ARIZONA BUSINESS OCCUPATIONS COMPETENCY-BASED CURRICULUM GUIDE. Arizona Department of Education, Phoenix, AZ. Pages TT 8-9, 14. 1980-81.

See Task 8.2.

8.0 **COMPETENCY/SKILL:** Receives and places telephone calls.

8.4 **TASK:** Transfers calls.

PERFORMANCE OBJECTIVE:

CONDITIONS: Given a telephone simulator and a role-playing situation with an incoming call for the student's supervisor,

EVALUATION: transfers the call,

STANDARD: promplty, courteously and carefully so that the caller is not cut off nor put on hold and ignored.

STUDENT LEARNING EXPERIENCES:

1. Tell the caller why and to which phone number the call is being transferred.

2. Transfer call to the proper executive, indicating caller's name and purpose.

3. Leave and return to the line promptly.

SUGGESTED INSTRUCTIONAL TECHNIQUES:

See Tasks 8.2 and 8.3.

INSTRUCTIONAL EQUIPMENT, MATERIALS, AND SUPPLIES:

See Tasks 8.2 and 8.3.

RESOURCES:

See Task 8.2.

8.0 **COMPETENCY/SKILL:** Receives and places telephone calls.

8.5 **TASK:** Takes Messages.

PERFORMANCE OBJECTIVE:

CONDITIONS: Given a verbal message containing 3 specific items of information,

EVALUATION: takes message and records it on message pad,

STANDARD: with neat, legible handwriting accurately recording all times, names, dates, numbers, places and other information.

STUDENT LEARNING EXPERIENCES:

1. Keep message pad close to the phone.
2. Repeat all dates, times, numbers for accuracy.
3. Record details accurately and completely while they are being given by the caller
4. Give messages to the person called, when they are available.

SUGGESTED INSTRUCTIONAL TECHNIQUES:

See Tasks 8.2 and 8.3.

INSTRUCTIONAL EQUIPMENT, MATERIALS, AND SUPPLIES:

See Tasks 8.2 and 8.3.

RESOURCES:

ARIZONA BUSINESS OCCUPATIONS COMMON CORE COMPETENCY MODULES. Arizona Department of Education, Phoenix, AZ. Arizona Center for Vocational Education, Handwriting page 14-15. September 1982.

See Task 8.2.

8.0 **COMPETENCY/SKILL:** Receives and places telephone calls

---

8.6 **TASK:** Receives telephone calls for visitors during meeting.

PERFORMANCE OBJECTIVE:

CONDITIONS: Given a simulated phone call which is for a visitor who is attending a meeting,

EVALUATION: answers the call, takes the message for the visitor, and notifies the visitor of the message,

STANDARD: promptly, courteously and carefully to get all details of time, place, person calling and notifies the visitor appropriately depending on urgency of message.

STUDENT LEARNING EXPERIENCES:

1. Take message to be given to visitor at conclusion of appointment or immediately, depending upon urgency of message.

2. Notify visitor via note or telephone call if message is urgent.

SUGGESTED INSTRUCTIONAL TECHNIQUES:

See Task 8.2 and 8.3.

INSTRUCTIONAL EQUIPMENT, MATERIALS, AND SUPPLIES:

See Task 8.2 and 8.3.

RESOURCES:

See Task 8.2.

RECEPTIONIST TERMS

APPOINTMENT CALENDAR - a preprinted calendar divided into half hour (or other) time segments used to record appointments, meetings, reminders, etc.

AUTOMATIC ANSWERING EQUIPMENT - telephone equipment available for purchase that permits callers to receive a recorded message when no one is in the office and gives an opportunity for the caller to leave a message.

AUTOMATIC DIALING EQUIPMENT - special telephone equipment available for purchase by an organization that provides quick access to frequently called numbers; automatic dialing attachments dial stored telephone numbers for you quickly and accurately.

CALL FORWARDING - service available for purchase that allows you to automatically transfer all incoming calls to any local or long distance number so that no calls are missed while you are away from the office.

CALL WAITING - special telephone service available for purchase that provides a short tone signal indicating that a second call is on the line while you are on the phone with the first caller. You may put the first caller on hold and answer the second call, thereby allowing you not to miss any calls because your phone is busy.

COLLECT CALL - long distance telephone call in which the person or firm you are calling agrees to pay the charge for the call.

CONFERENCE CALL - a telephone call that allows 2-50 people in different geographic locations to be connected on one line at the same time in order to participate in the same conversation.

CREDIT CARD CALL - long distance telephone call which allows you to simply read the number from your telephone credit card to the operator and the call will be charged to the appropriate account. Commonly used by business executives who travel regularly.

DIRECT DISTANCE DIALING - method of placing long distance telephone calls by following specific dialing instructions that do not require the assistance of an operator.

FILE - in the context of telegraphic communications, the term "file" is used when referring to the transmitting of a telegraphic message.

FULL-RATE INTERNATIONAL TELEGRAM - (also referred to as a cablegram) international telegraphic service which provides the fastest and most expensive means of sending a message overseas.

FULL-RATE TELEGRAM - telegraphic service offered by Western Union which provides the fastest (and most expensive) means for sending a message within the United States either day or night.

INTERNATIONAL CALL - refers to a long distance telephone call placed to locations outside of the United States.

INTERNATIONAL MONEY ORDER - telegraphic service which allows money to be sent to nearly every country in the world.

INWARD WATS - special service that can be purchased by an organization which permits station-to-station long distance calls to be made to the organization without charge to the caller. (Usually referred to as toll-free numbers.) The area code is always 800.

LETTER TELEGRAM OR CABLE LETTER - international telegraphic service which provides delivery of a message the following morning.

LONG DISTANCE FILE CARD - form used to record specific information regarding a long distance telephone call.

MAILGRAM - telegraphic service within the United States in which the message is sent by Western Union wire to the post office and delivered the next day with the regular mail.

MESSAGE FORM - when a person is out of the office, this form is used to record the information or a message intended for the absent person from a telephone call or personal visit.

MOBILE PHONE - special telephone equipment available for purchase which allows local and long distance telephone calls to be placed and received while out of the office (for example in an automobile, airplane, or boat). Helpful to communicate with business executives who are often out of the office.

OPERATOR-ASSISTED CALL - long distance telephone call which requires assistance from the operator to complete the call.

OVERNITE TELEGRAM - telegraphic service within the United States offered by Western Union which provides next-day delivery for a message sent any time during the day up to midnight.

PERSONAL OPINION MESSAGE - telegraphic service that allows you to express an opinion or view regarding a matter of public interest to certain United States government or state officials.

PERSON-TO-PERSON CALL - long distance telephone call in which you request through the operator to speak to a particular person or extension. Charging begins when conversation with the person begins; rates are higher than station-to-station calls.

RADIOGRAM - international telegraphic service that allows messages to be sent, either in plain language or code, to and from ships at sea.

REGISTER OF LONG DISTANCE CALLS - form used to record information pertaining to all long distance telephone calls placed by an organization or department in a one-month period.

RULES FOR COUNTING CHARGEABLE WORDS - refers to the established guidelines which Western Union follows to determine the number of words which will be charged for when sending a telegraphic communication.

SPEAKER PHONE - special telephone equipment that allows you to talk and listen to telephone conversations without picking up the receiver. Helpful when a group of people need to hear both sides of the conversations.

STATION-TO-STATION CALL - long distance telephone call which may be dialed directly and charges begin when the telephone is answered. You are charged for the call even if the person you wish to speak with is not available. Rates are lover than calls that require operator assistance.

TELEGRAPH - an apparatus or system used to transmit messages by electric impulses sent through a wire or converted into radio waves.

TELEGRAPHIC COMMUNICATIONS - refers to the giving or exchanging of informations transmitted through a telegraph network.

TELEGRAPHIC MONEY ORDER - telegraphic service that provides a fast and safe way to send money to persons located in many areas of the United States.

TELEPHONE ETIQUETTE - the application of good manners and proper techniques used when involved in a telephone conversation.

TELETYPEWRITER - a special machine, which is a form of a telegraph and similar to a typrvriter, that is capable of both sending and receiving telegraphic messages.

TELEX - refers to a teletypevriter network available for an organization to subscribe to for the purpose of transmitting and receiving telegraphic messages.

TIE-LINES - telephone connections that tie two telephones directly together (such as a branch office with the corporate headquarters). A fixed monthly charge is required.

TWX (pronounced twix) - refers to a teletypevriter network available for an organization to subscribe to for the purpose of transmitting and receiving telegraphic messages.

WIDE AREA TELEPHONE SERVICE (WATS LINE) - special service which can be purchased by an organization that allows a fixed charge to be paid for any number of long distance calls within a WATS area rather than paying for each long distance call individually.

*SECRETARIAL OCCUPATIONS V-TECS GUIDE.

RECEIVING TELEPHONE CALLS

The telephone is a vital form of communication for every type of organization. The task of answering the telephone and processing incoming calls must be done with skill in order to project a good image for the organization. It is imperative to have knowledge of and apply proper TELEPHONE ETIQUETTE, which should include the following:

1. Answer the telephone promptly and at least before the third ring.
2. The caller should be greeted pleasantly.
3. Identify your organization in the greeting.
4. Listen carefully and attentively to the caller.
5. Use the caller's name during the conversation.
6. Never imply by your voice that the call is an intrusion.
7. Use "please" and "thank you" during the conversation.
8. Apologize to the caller for any errors or delays.
9. Be helpful to the caller and follow through on any promises.
10. Enunicate words clearly and avoid slang terminology.
11. Always be prepared to take a message.
12. Hold the mouthpiece of the telephone about an inch from your lips and speak directly into the telephone in a pleasant, conversational tone.
13. Be courteous in the close of the call and allow the caller to hang up first.

If it is necessary for you to be away from your desk, arrange for someone to be available to answer the telephone.

The employer will be able to respond more intelligently if the caller's name is know. Phrases which are appropriate for obtaining a caller's name include, "May I ask who is calling, Please?" or "May I tell him/her who is calling?". Once the caller's identity and the nature of the call is known, the call should be processed in one of the following ways:

1. Provide information (if permissible).
2. Transfer call and information obtained to appropriate person.
3. Place call on hold if caller desires to wait.
4. Record and deliver messages and/or schedule office appointments.

Prior to providing any information to the caller, make sure it is not against any company policies and always be certain of the facts. The actual procedures for transferring a call will vary with the telephone equipment used by the organization; however, standard guidelines for transferring calls should be followed. The caller should always be informed who the call is being transferred to and you should give the caller your name and extension in case the call is disconnected. The person who will be receiving the call should be informed of the caller's name and any other information which you have obtained from the caller. Prior to placing a caller on hold, it is proper to first inform the caller, such as, "I'm sorry Mr. Morgan, Ms. Smith is on another line right now. Do you care to hold or shall I take a message?" Check back periodically with the caller on hold. Accuracy is vital when taking telephone messages. Listen carefully to the caller and obtain the name of the person for whom the message is intended; the complete and correctly spelled name and organization of the caller; the caller's telephone number; and the message. You should repeat the information back to the caller to make sure it is correct after you have recorded it on the MESSAGE FORM. The date and time of the call should be

recorded, along with your name or initials so that the employer will know who to check with if she/he has a question concerning the message. (A sample message form is shown below.)

The APPOINTMENT CALENDAR should be handy because the caller may request to schedule an office appointment with your employer. (Refer to the unit on COORDINATING AND PERFORMING EMPLOYER ACTIVITIES for information on maintaining your employer's appointment calendar.) In some large offices, however, the receptionist may simply refer a caller to the secretary or assistant of the person with whom an appointment is desired.

PLACING TELEPHONE CALLS

Placing telephone calls is a familiar activity to most people, however, placing telephone calls in an organization requires the application of proper techniques and TELEPHONE ETIQUETTE in order to create a positive impression for the organization. Communication via the telephone is fast and convenient and is used often in organizations each business day. There are various types of telephone systems and equipment available for organizations to use and the actual procedure for placing the call will vary with the established system. To be an effective office employee, it is necessary to know and apply good telephone skills and to have a working knowledge of your organization's telephone system and equipment.

Before placing a telephone call, you must first plan the call. Planning the call includes obtaining the number to be called, so references for telephone numbers should be kept handy. These references include personal telephone directories or file cards where frequently called names and numbers are recorded, an Alphabetical Telephone Directory (white pages) of your city and other local cities, the Yellow Pages, and a directory of names and numbers within your organization. Local and long distance telephone numbers can also be obtained through a directory assistance operator. To locate the number for any government agency, you should look in the Alphabetical Telephone Directory under "United States Government". State agencies are listed under the name of the appropriate state; and municipal and county agencies are listed under the name of the city, town, or county. Useful information is included in the introductory pages of the telephone directory regarding area codes, time zones, rates, and intructions for making local, long distance, service, emergency, and overseas calls. When planning telephone calls, be sure to write down the number being called, name of the person and/or organization you are calling, and the questions or information which make up the purpose of the call. If a file or supporting correspondence may be needed during the conversation, make sure it is on your desk before placing the call.

Due to the cost associated with long distance calls, it is important to be familiar with all types of long distance services available and select the most appropriate service. The major types of long distance calls include OPERATOR-ASSISTED CALLS, DIRECT DISTANCE DIALING, and INTERNATIONAL CALLS. Operator-assisted calls require help from an operator to complete the call. Examples of these include PERSON-TO-PERSON CALLS, COLLECT CALLS, CREDIT CARD CALL, and calls with special billing instructions, such as billing to your home phone number. (See terminology sheet for a definition of each of the above terms.) Direct distance dialing is a method of placing long distance telephone calls by following specific dialing instructions that do not require the assistance of an operator. Most STATION-TO-STATION calls are placed through direct distance dialing, because both time and money are saved when direct distance dialing is used. International calls usually require operator assistance, but there are about 75 countries which can be dialed direct. If a wrong number is reached when calling long distance, contact the operator immediately to obtain credit for the call.

Once you have reached the party you are calling, identify yourself and your affiliation. For example, you might say, "Good morning, this is Susan Myers, Mr. Nelson's secretary at the Nelson Law Firm". Then, proceed to briefly and concisely state the purpose of your call. If you are calling to obtain information, always read the information back to make sure it is

accurate. Always speak in a professional and friendly manner and be sure to thank the person at the conclusion of the call. If you are disconnected during the call, it is the obligation of the person who placed the call to call again.

There are special services and equipment available to organizations, at additional cost, to help increase communication effeciency. Examples of these include:

1. WIDE AREA TELEPHONE SERVICE (WATS LINE)
2. INWARD WATS (TOLL-FREE NUMBERS)
3. TIE-LINES
4. CONFERENCE CALLS
5. SPEAKER PHONES
6. MOBILE PHONES
7. CALL FORWARDING
8. AUTOMATIC ANSWERING EQUIPMENT
9. CALL WAITING
10. AUTOMATIC DIALING EQUIPMENT.

(Refer to terminology sheet for a definition of each term.)

The telephone service industry, which is a public utility, is regulated by the government of the United States. In the past, AT&T and its Bell System have primarily dominated the market for providing telephone equipment and telephone/telecommunication services. However, due to recent legislation, more private companies are nov entering the market offering telephone equipment and telephone/telecommunication services. It is wise to check the available alternatives when selecting telephone equipment and services.

9.0 **COMPETENCY/SKILL:** Receives visitors to the office.

9.1 **TASK:** Greets visitors and determines purpose of the visit.

PERFORMANCE OBJECTIVE:

CONDITIONS: Given a role-playing situation in which the instructor is the caller,

EVALUATION: greets the caller and determines the purpose of the visit.

STANDARD: Promptly and courteously gives the individual undivided attention, determines purpose of the visit and offers a seat if the caller must wait.

STUDENT LEARNING EXPERIENCES:

1. Greet and direct callers promptly and courteously, makes proper introductions, and treats each caller as a guest.
2. Communicate with caller using concise, specific, and grammatically correct language.
3. Keep callers informed about delays.
4. Remain calm and courteous when handling difficult callers.
5. Ask the name, company represented, and purpose of visit of unscheduled callers.
6. Converse sparingly but pleasantly with callers.
7. Remember names and faces.

SUGGESTED INSTRUCTIONAL TECHNIQUES:

1. Assign a brief paper asking the students to give reasons why the task of greeting callers is important for an organization's image.

2. Ask students to describe the best way to handle each of the following situations.

   a. Routine situation where visitor is immediately admitted.

   b. Job applicant with a scheduled appointment.

   c. Employer is busy and the visitor will have to wait about 20 minutes.

   d. Visitor who arrives 25 minutes late for a scheduled appointment and the employer is now unable to see the visitor.

3. Role play the situations discussed above.

INSTRUCTIONAL EQUIPMENT, MATERIALS, AND SUPPLIES:

1. Simulation where student sits at a desk and serves as receptionist.

2. Message pad, calendar.

RESOURCES:

Fruehling, Rosemary T., and Constance K. Weaver. ELECTRONIC OFFICE PROCEDURES. Gregg/McGraw-Hill Book Company, Novato, CA. 1987.

Fulton, Patsy J., Joanna D. Hanks, J. Sargeant Reynolds. PROCEDURES FOR THE PROFESSIONAL SECRETARY. South-Western Publishing Company, Cincinnati, OH. 1985

Kutie, Rita C., and Joan L. Rhodes. SECRETARIAL PROCEDURES FOR THE ELECTRONIC OFFICE. John Wiley & Sons, Inc., New York, NY. 2ND ED. 1986.

Luke, Cheryl M., and C. B. Stiegler. OFFICE SYSTEMS AND PROCEDURES. Houghton Mifflin Company, Boston, MA. 1986.

Moon, H. R. OFFICE PROCEDURES AND TECHNOLOGY. MPC Educational Publishers, Bronx, NY. Date unavailable.

Rosen, Arnold, Eileen Feretic, Margaret H. Bahniuk. ADMINISTRATIVE PROCEDURES FOR THE ELECTRONIC OFFICE. John Wiley & Sons, Inc., New York, NY. 2ND ED. 1985.

9.0 **COMPETENCY/SKILL:** Receives visitors to the office.

9.2 **TASK:** Applies company policies and exective preference regarding an unscheduled visitor.

PERFORMANCE OBJECTIVE:

CONDITIONS: Given a role-playing situation in which the instructor is the unscheduled visitor,

EVALUATION: greets the visitor, determines purpose of the visit, obtains name and company represented, and assists the visitor,

STANDARD: according to company policy in a prompt, courteous manner.

STUDENT LEARNING EXPERIENCES:

1. Escort new or distinguished visitors to the executive's office, secretary's desk, or meeting room depending upon company policy.

2. Ask the name, company and purpose of visit of unscheduled visitor.

3. Direct visitor to the appropriate executive, if policy permits.

4. Review various company manuals to determine varying policy for admitting unscheduled visitors and handling solicitations.

SUGGESTED INSTRUCTIONAL TECHNIQUES:

1. Discuss and role play the following situations:

   a. Visitor is very upset and demands immediate entrance to the employer's office.

   b. Visitor is soliciting contributions for a local charity drive.

   c. Visitor is denied admittance by employer.

   d. Visitor has come for an appointment on the wrong day.

   e. Visitor approaches the receptionist very kindly and asks if the receptionist would like to buy some typewriter ribbons at a special price.

INSTRUCTIONAL EQUIPMENT, MATERIALS, AND SUPPLIES:

1. Policy manuals

RESOURCES:

See Task 9.1

9.0 **COMPETENCY/SKILL:** Receives visitors to the office.

9.3 **TASK:** Applies company policies and executive preference regarding a scheduled visitor.

PERFORMANCE OBJECTIVE:

CONDITIONS: Given a role-playing situation in which the instructor is the visitor,

EVALUATION: greets and directs the visitor,

STANDARD: promptly and courteously according to company policy.

STUDENT LEARNING EXPERIENCES:

See Task 9.1 and 9.2.

SUGGESTED INSTRUCTIONAL TECHNIQUES:

See Task 9.1 and 9.2.

INSTRUCTIONAL EQUIPMENT, MATERIALS, AND SUPPLIES:

See Task 9.1 and 9.2.

RESOURCES:

See Task 9.1.

9.0 **COMPETENCY/SKILL:** Receives visitors to the office.

9.4 **TASK:** Manages visitors who are waiting in the reception area.

PERFORMANCE OBJECTIVE:

CONDITIONS: Given five case studies involving management of visitors in the reception areas,

EVALUATION: writes a solution for each case,

STANDARD: according to standards set in sample company policy manuals and instructor expectations.

STUDENT LEARNING EXPERIENCES:

1. Ask visitors who must wait to be seated.
2. Converse sparingly but pleasantly with visitors waiting for appointments.
3. Keep visitor informed about delay if executive is not ready to see the visitor.
4. Remain calm and courteous when handling difficult visitors.
5. Keep appropriate records of visits.

SUGGESTED INSTRUCTIONAL TECHNIQUES:

1. Role play with students asking directions and giving directions to the nearest fast food restaurant, football field, post-office etc.
2. Practice introductions with students introducing each other to the instructor.

INSTRUCTIONAL EQUIPMENT, MATERIALS, AND SUPPLIES:

1. Sample policy manuals.

RESOURCES:

See Task 9.1.

10.0 **COMPETENCY/SKILL:** **Processes mail following company procedures.**

10.1 **TASK:** **Processes incoming mail based on the employer's needs.**

PERFORMANCE OBJECTIVE:

CONDITIONS: **Given 10 pieces of incoming mail, including some marked Personal/Confidential,**

EVALUATION: **sorts, and distributes the mail to the proper department/individual,**

STANDARD: **with 100 percent accuracy.**

STUDENT LEARNING EXPERIENCES:

1. **Sign for packages received.**
2. **Sort and opens envelopes and checks for any enclosures.**
3. **Date and time-stamps mail.**
4. **Route mail.**

SUGGESTED INSTRUCTIONAL TECHNIQUES:

1. Develop a list of the steps involved in processing incoming mail to use as a checklist for processing activities.

2. Simulate incoming mail items and procedures so that students have a chance to handle a variety of mail items.

3. Collect various classes of mail as examples, display as bulletin board items.

4. Discuss and demonstrate use of mail registers.

5. Ask school administrator to allow the class to sort the school mail as a learning activity.

INSTRUCTIONAL EQUIPMENT, MATERIALS, AND SUPPLIES:

1. Zip Code Directory, US Postal Manual, mailing labels and bands, mail scales, bulletin board materials, samples of mail and mail register forms.

2. Access to a postal meter and an Optical Character Reader (optional).

3. Information sheets, back of this unit.

RESOURCES:

ARIZONA BUSINESS OCCUPATIONS COMPETENCY-BASED CURRICULUM GUIDE. Arizona Department of Education, Phoenix, AZ. Pages MP 1-15. 1980-81.

Fulton, Patsy J., Joanna D. Hanks, J. Sargeant Reynolds. PROCEDURES FOR THE PROFESSIONAL SECRETARY. South-Western Publishing Company, Cincinnati, OH. 1985.

Kutie, Rita C., and Joan L. Rhodes. SECRETARIAL PROCEDURES FOR THE ELECTRONIC OFFICE. John Wiley & Sons, Inc., New York, NY. 2ND ED. 1986.

Luke, Cheryl M., and C. B. Stiegler. OFFICE SYSTEMS AND PROCEDURES. Houghton Mifflin Company, Boston, MA. 1986.

Moon, H. R. OFFICE PROCEDURES AND TECHNOLOGY. MPC Educational Publishers, Bronx, NY. Date unavailable.

Rosen, Arnold, Eileen Feretic, Margaret H. Bahniuk. ADMINISTRATIVE PROCEDURES FOR THE ELECTRONIC OFFICE. John Wiley & Sons, Inc., New York, NY. 2ND ED. 1985.

10.0 **COMPETENCY/SKILL:** Processes mail following company procedures.

10.2 **TASK:** Processes outgoing mail based on employer's needs.

PERFORMANCE OBJECTIVE:

CONDITIONS: Given an in-basket activity which includes preparation of mailing envelopes, selection of mailing method and figuring costs and dispatch times, and presorting the finished items,

EVALUATION: types the labels, identifies the mailing method to be used, figures the costs and organizes the items,

STANDARD: with an acceptable rating on a checklist.

STUDENT LEARNING EXPERIENCES:

1. Select the proper envelopes for mailing.
2. Address mail correctly.
3. Collect outgoing mail.
4. Separate and presort outgoing mail.
5. Decide on least expensive and/or most desirable method of delivery.
6. Arrange mailing schedule in accordance with post office dispatch times.

SUGGESTED INSTRUCTIONAL TECHNIQUES:

1. Ask students to collect samples of mail to illustrate the classes of mail and postal services offered. Use for bulletin board display of in-basket activities.

2. Collect and use US Postal Service brochures describing its services. Combine various references and develop a terminology glossary.

3. Visit a mailroom of a local business and/or the Post Office.

4. Accumulate sample mail for a hands-on activity in which students weigh and calculate postage.

5. Discuss or view in operation the Optical Character Reader.

INSTRUCTIONAL EQUIPMENT, MATERIALS, AND SUPPLIES:

See Task 10.1.

RESOURCES:

ARIZONA BUSINESS OCCUPATIONS COMPETENCY-BASED CURICULUM GUIDE. Arizona Department of Education, Phoenix, AZ. Pages MP 1-15. 1980-81.

See Task 10.1.

MAIL TERMS

ADDRESS CORRECTION FORM - a printed form which allows an individual or business to easily indicate any changes in address and returen to the appropriate persons.

ANNOTATE - to provide explanatory marks or notes in the margins of correspondence in order to aid the employer.

CERTIFICATE OF MAILING - certificate which is completed by the postal service at the time of mailing which provides proof that the item was mailed.

CERTIFIED MAIL - special mail service for first-class mail which provides a receipt for the sender that the item was mailed and a record of delivery; no insurance coverage provided.

CHAIN-FEEDING METHOD - addressing procedure in which a blank envelope is inserted into a typewriter at the same time the typed envelope is removed.

C.O.D. SERVICE (Collect on Delivery) - seller arranges for the postal service to collect the money for merchandise sent to the addressee at the time of delivery.

DOMESTIC MAIL - refers to mail sent and delivered within the United States.

ELECTRONIC MAIL - refers to mail sent by computer.

EXPRESS MAIL - fastest method of processing mail including any mailable item up to 70 pounds; guarantees next day delivery for certain United States cities.

FIRST-CLASS - mail items weighing up to and including 12 ounces which are sent by air service or the fastest means available. Usually includes letters, post card, bills, checks, etc.

FOURTH-CLASS - packages which weigh 16 ounces or over and are not included in first, second, or third-class mail.

INSURED MAIL - service which allows sender to insure third or fourth-class mail up to $400 against loss or damage. If parcel is lost or damaged, the postal service will reimburse the sender for the value of the merchandise or the amount insured, whichever is smaller.

INTERNATION MAIL - refers to mail addressed to a location outside the United States.

INTEROFFICE MAIL - correspondence originated and transferred within the office.

MAIL REGISTER - recordkeeping instrument used to record special incoming mail and expected items.

MAILGRAM - message sent by Western Union to the post office and delivered with the regular mail.

PERSONAL (CONFIDENTIAL) MAIL - mail items which are intended only for a specific individual's review.

PRIORITY MAIL - first-class mail weighing over 12 ounces.

RECALLING MAIL - upon prompt completion of Form 1509 by the sender, the postal service will try to have a piece of mail returned to the sender if it has not already been delivered.

REGISTERED MAIL - provides protection for sending valuable or important first-class or priority items. Mail may be registered for any amount but postal service will only pay up to $25,000.

ROUTING SLIP - a sheet of paper attached to a mail item which lists the names of the persons to whom an item is to be distrubuted.

SECOND-CLASS - class of mail available only to publishers and registered news agents to use in sending out newspapers, periodicals, magazines, etc.

SPECIAL DELIVERY - provides any class of mail with the same prompt delivery time as given to first-class mail and includes delivery by messenger during certain hours within certain distances.

SPECIAL HANDLING - service less expensive than special delivery which provides faster handling for third and fourth-class mail.

TELECOMMUNICATIONS - any communication requiring the use of telephone or telegraph lines or satellite networks.

THIRD-CLASS - mail items which weigh less than 16 ounces and are not included in first or second-class mail. Usually includes advertisements, merchandise, books, catalogs, etc.

TRACING MAIL - upon completion of appropriate form, the postal service will try to locate mail which has not been delivered within a reasonable time; however, it is very difficult to locate mail unless it was registered, insured or certified.

ZIP CODE - five or nine-digit code used by the Postal Service to speed up the processing of mail; the code makes it possible for the mail to be sorted by a machine.

*SECRETARIAL OCCUPATIONS V-TECS GUIDE.

PROCESSING INCOMING MAIL

Incoming mail should be processed upon delivery. It is vital to any organization that the mail handling procedures be done in a timely and organizied manner.

The sequential steps involved in processing incoming mail include the following:

1. Classifying and sorting;
2. Opening;
3. Removing and inspecting contents;
4. Date stamping;
5. Completing the mail register;
6. Reading and annotating;
7. Distributing.

The step at which you begin depends on the size of the organization and the established procedures for handling incoming mail.

Classifying and sorting incoming mail is an important organizational step. Mail should fall under one of the following classifications:

1. Telecommunications such as telegrams, mailgrams, telex, and computer printout sheets;
2. Special delivery, Certified, or Registered Mail;
3. Personal mail;
4. First-class mail, including bills and statements;
5. Interoffice mail;
6. Newspapers and periodicals;
7. Booklets, catalogs and advertising materials;
8. Packages.

FIRST-CLASS LETTERS in regular envelopes can be recognized by the amount of postage and the dated postmark. Larger first-class mail is either sent in a large manila envelope with a distinctive border or labeled "First-class". When SPECIAL DELIVERY, REGISTERED, or CERTIFIED letters are delivered, someone must sign for them upon receipt. These types of mail items should receive top priority.

Incoming mail may be opened by hand or with a time-saving electric mail opener. In either case, you should tap the lower edges of the envelope so the contents will fall to the bottom prior to opening. This will reduce the possibility of cutting the contents. PERSONAL OR CONFIDENTIAL mail items should never be opened. If a letter is opened by mistake, seal it with transparent tape and write "opened by mistake" and your initials on the envelope. When opening packages, first check to see if special opening instructions are printed on the package. Always check the contents of the package with the packing skip or invoice.

Removing and inspecting the contents of mail items should be done carefully. Each letter should be examined for the sender's address, date, and signature of sender. You should also check the enclosures received with the enclosure notation on the letter. If an enclosure notation was not used, it may be necessary to quickly scan through the letter to determine if all the appropriate enclosures were received. If cash, checks or money orders are received, check the amount enclosed with the amount mentioned in the letter or invoice. Attach enclosures to the corresponding documents using paper clips when a staple would damage any of the items. If an enclosure is missing, check the envelope again. If it is not found, make a note on the

corresponding document indicating that the enclosure was not included and write or phone the originating company regarding the missing enclosure. The envelope may be discarded if the sender's address, date, signature of sender, and enclosures are all included. If one of these items is not included or if there is a discrepancy, attach the envelope to the back of the document.

Date stamping may be done in one of three ways; by stamping the word "Received" and/or the date with a hand stamp; by writing the date using a pen or pencil; or by stamping the date and time of arrival with a date-time recorders. Certain businesses may request that the time be included for legal significance.

The MAIL REGISTER is a recordkeeping instrument used to record expected items and special incoming mail. When mail items or packages are expected by a certain date, an entry is made in the mail register. When the item is received, the appropriate notation is made. The register should be checked daily to see if expected items have been received. If not, action to determine the reason for the delay should be taken. Receipt of insured, special delivery and registered mail can also be recorded in the mail register. Another use of the register is to record mail coming to one office that will be distributed to several people.

Much time can be saved for both you and your employer by making notes and grouping correspondence according to the next step to be taken for each item. Correspondence (except for personal items) should be read quickly, concentrating on the main purpose of the letter and the action that should be taken. For example, the letter might require making notes on the appointment calendar or sending out requested information. Underline words or phrases which stress the key points and make marginal ANNOTATIONS which might be helpful to the employer. Some executives prefer that nothing be underlined or written in the margins; therefore, be sure to check with the employer befor initiating this step.

ROUTING SLIPS and photocopies may be used to increase efficiency in distributing mail. Corresponding files or other necessary information should be included with the mail item when presenting it to the employer.

Efficiency in handling incoming mail is a must for all organizations. The sooner the steps involved in processing incoming mail are completed, the quicker the appropriate persons can respond to the mail items received.

The postal service encourages organizations to follow certain procedures to assist in the mail being processed quickly. ROUGH-SORTING and FACING the mail is encouraged. Rough-sorting includes sorting the mail according to local and out-of-town and facing means to arrange the envelopes to that all addresses face forward and read from left to right. The postal service will provide free mailing bands so that the faced and sorted mail can also be bundled by the organization's mail staff. Some classes of mail are required by postal regulations to be sorted, bundled, placed on trays and labeled with the ZIP Code number.

Always remember to use a ZIP Code on anything to be mailed because this speeds up the processing of mail. The ZIP CODE, which is the abbreviation for Zoning Imporvement Plan, is a five-digit code which makes it possible for the mail to be sorted by machines. On October 1, 1983, full implementation of the new ZIP + 4 code consists of the present five-digit ZIP Code followed by a hyphen and four new digits. The first five digits of the ZIP Code designates a particular geographic location and the four new numbers represent two even smaller geographic units, such as several city blocks, groups of streets, large buildings, etc. The nine-digit code is not required at this time, but is a voluntary program designed to promote increased automation in the processing of mail.

*SECRETARIAL OCCUPATIONS V-TECS GUIDE.

PROCESSING OUTGOING MAIL

The procedures established for processing outgoing mail vary with the size of the organization. In a small office, the secretary is usually completely responsible for the mail. Larger offices usually have a mail department to perform a majority of the steps involved in processing outgoing mail.

It is important to know the types and classes of mail and the special mailing services available. The most commonly used classes of DOMESTIC MAIL (which means mail within the United States) included first, second, third, and fourth-class, and priority mail. The domestic category of airmail has been discontinued and all first-class mail has been upgraded to the status of airmail. FIRST-CLASS MAIL includes items weighing up to and including 12 ounces which are sent by air service or the fastest means available. First-class mail includes letters, post cards, or forms such as checks or bills. PRIORITY MAIL is first-class mail weighing over 12 ounces, and the postage required is figured by the weight and destination. SECOND-CLASS MAIL is available only to publishers and registered news agents to use in sending out newspapers, periodicals, magazines, etc. Third-class maid includes items that weigh less than 16 ounces and are not classified as first or seceond-class. THIRD-CLASS MAIL is usually slower than other types of mail, and primarily includes advertisements, merchandise, books, catalogs, and other printed material. FOURTH-CLASS MAIL (also known as parcel post) includes packages which weigh 16 ounces or over and are not included in first, second, or third-class mail. Postage rates are determined by the weight of the package and the distance the package will travel. It is possible to mix classes of mail if special instructions are followed. Mixing classes of mail means sending two pieces of mail from different classes as a single mailing (such as a letter and a catalog). The primary purpose of doing this is to make sure that the items arrive at the same time. INTERNATIONAL MAIL includes mail addressed to locations outside of the United States. Letters and post cards addressed to Canada or Mexico have the same postal rates as for those mailed inside the United State.

The United States Postal Service also offers many special mailing services which include:

1. Certificates of mailing;
2. Certified mail;
3. C.O.D. service;
4. Express mail;
5. Insured mail;
6. Mailgrams;
7. Recalling mail;
8. Registered mail;
9. Special delivery;
10. Special handling;
11. Tracing mail.

Most of these services require additional fees. Refer to the terminology sheet for a description of each service.

SECRETARY

1.0 **COMPETENCY/SKILL:** Uses written and oral communication skills.

1.1 **TASK:** Writes/prints legibly.

PERFORMANCE OBJECTIVE:

See Receptionist 1.1.

CONDITIONS:

EVALUATION:

STANDARD:

STUDENT LEARNING EXPERIENCES:

SUGGESTED INSTRUCTIONAL TECHNIQUES:

INSTRUCTIONAL EQUIPMENT, MATERIALS, AND SUPPLIES:

RESOURCES:

1.0 **COMPETENCY/SKILL:** Uses written and oral communication skills.

1.2 **TASK:** Uses concise, specific and grammatically correct language in communications with callers.

PERFORMANCE OBJECTIVE:

See Receptionist 1.2.

CONDITIONS:

EVALUATION:

STANDARD:

STUDENT LEARNING EXPERIENCES:

SUGGESTED INSTRUCTIONAL TECHNIQUES:

INSTRUCTIONAL EQUIPMENT, MATERIALS, AND SUPPLIES:

RESOURCES:

1.0 **COMPETENCY/SKILL:** Uses written and oral communication skills.

1.3 **TASK:** Uses information about organization, operations and structure.

PERFORMANCE OBJECTIVE:

See Receptionist 1.3.

CONDITIONS:

EVALUATION:

STANDARD:

STUDENT LEARNING EXPERIENCES:

SUGGESTED INSTRUCTIONAL TECHNIQUES:

INSTRUCTIONAL EQUIPMENT, MATERIALS, AND SUPPLIES:

RESOURCES:

1.0 **COMPETENCY/SKILL:** Uses written and oral communication skills.

1.4 **TASK:** Proofreads and edits to produce mailable business documents.

PERFORMANCE OBJECTIVE:

See Receptionist 1.4.

CONDITIONS:

EVALUATION:

STANDARD:

STUDENT LEARNING EXPERIENCES:

SUGGESTED INSTRUCTIONAL TECHNIQUES:

INSTRUCTIONAL EQUIPMENT, MATERIALS, AND SUPPLIES:

RESOURCES:

1.0 **COMPETENCY/SKILL:** Uses written and oral communication skills.

1.5 **TASK:** Compiles information and composes written communications to produce mailable business documents.

PERFORMANCE OBJECTIVE:

CONDITIONS: Given a letter requesting specific information about a product,

EVALUATION: collects data, composes and types the response in mailable form,

STANDARD: with all items on the checklist rated acceptable.

STUDENT LEARNING EXPERIENCES:

1. Review grammar and language arts units in class texts and reference materials.

2. Compile information and composes topic sentences, short paragraphs and keyboards documents.

3. Read, check for accuracy, and correct all self-composed materials.

4. Read, check for accuracy, and return for corrections materials composed and typed by fellow students.

5. Serve as class proofreader for a period of time.

6. Respond in writing to oral and written requests for information.

SUGGESTED INSTRUCTIONAL TECHNIQUES:

1. Assign student to collect samples and/or list the types of documents most commonly composed by secretaries in offices in their community.

2. Occasionally have students work in pairs when composing. By working together they will be able to help each other choose the best thought, sentence structure and words.

3. Assignments should be designed to give the student an increasing amount of autonomy.

4. In-basket writing activities should be emphasized.

5. Develop a checklist for evaluating correspondence.

INSTRUCTIONAL EQUIPMENT, MATERIALS, AND SUPPLIES:

1. Office-style reference manual, typewriters or text editors, proofreading exercises, telephone training equipment (optional).

RESOURCES:

ARIZONA BUSINESS OCCUPATIONS COMPETENCY-BASED CURRICULUM GUIDE. Arizona Department of Education, Phoenix, AZ. Pages CA/I 1-6, CA/Ls 1-13. 1980-81.

Branchav, B. P. ENGLISH MADE EASY. Gregg/McGrav-Hill Book Company, Novato, CA. 2ND ED. 1986.

Burtness, Paul S., and Jack E. Hulbert. EFFECTIVE BUSINESS COMMUNICATION. South-Western Publishing Company, Cincinnati, OH. 1985.

Mansfield, Carmella E., and Margaret H. Bahniuk. WRITING BUSINESS LETTERS AND REPORTS. Glencoe Publishing Company, Encino, CA. 2ND ED. Date unavailable.

McComas, Donna, and Marilyn Satterwhite. MODERN BUSINESS CORRESPONDENCE. Gregg/McGrav-Hill Book Company, Novato, CA. 5TH ED. 1986.

Murphy, Herta A., and Herbert W. Hildebrandt. EFFECTIVE BUSINESS COMMUNICATIONS. Gregg/McGrav-Hill Book Company, Novato, CA. 4TH ED. 1984.

Reigel, Charles. BASIC LANGUAGE SKILLS. Glencoe Publishing Company, Encino, CA. Date unavailable.

Sheff, Donald A. BUSINESS CORRESPONDENCE. Bobbs-Merrill Educational Publishing, Indianapolis, IN. Date unavailable.

Stevart, Marie M., Kenneth Zimmer, Lyn Clark, BUSINESS ENGLISH AND COMMUNICATION. Gregg/McGrav-Hill Book Company, Novato, Calif. 6th edition, 1984.

Williams, John W., and Steven A. Eggland. COMMUNICATION IN ACTION. South-Western Publishing Company, Cincinnati, OH. 1985.

WRITING BUSINESSS LETTERS.

2.0 **COMPETENCY/SKILL:** Uses personal responsibility skills.

2.1 **TASK:** Conducts oneself in a courteous, businesslike manner at all times.

PERFORMANCE OBJECTIVE:

CONDITIONS:

See Receptionist 2.1

EVALUATION:

STANDARD:

STUDENT LEARNING EXPERIENCES:

1. See Receptionist 2.1.
2. Accept responsibility for own actions.
3. Contribute to a team effort.
4. Recognize confidentiality, ethical and legal responsibilities.
5. Confer with co-workers, and supervisors.
6. Take the initiative to be helpful.
7. Maintain good personal health and grooming; dress appropriately.
8. Use logic in problem solving and decision making.
9. Keep work area clean and neat.

SUGGESTED INSTRUCTIONAL TECHNIQUES:

1. Work with the following experiences individually or in combination as you complete some of the teaching suggestions:
   A. maintains a professional work attitude;
   B. works well under pressure and stress situations;
   C. demonstrates flexibility and adaptability;
   D. accepts responsibility for own actions;
   E. contributes to a team effort;
   F. recognizes confidentiality, ethical and legal responsibilities;
   G. confers with co-workers, and supervisors;
   H. takes the initiative to be helpful;
   I. maintains good personal health and grooming; dresses appropriately;
   J. uses logic in problem solving and decision making;
   K. keeps work area clean and neat.

2. Prepare personal checklist, complete the list and develop a personal growth plan based on individual answers.

3. Require students to practice good examples of these learning activities throughout the school year. Stress these 11 experiences through year-round class procedures.

4. Introduce and practice the five steps in the fact-finding method to solving case problems: 1. Identification of the problem; 2. Pertinent facts relating to the problem; 3. Analysis of the problem; 4. Possible solutions and ramifications; 5. Best solution and defense. Require students to defend decision making throughout the school year by identifying their process based on the 5-point checklist.

5. Use role playing situations, case studies, and decision-making projects that relate to the experiences. Ask students to write case problems from experiences.

6. Design activities so that work flow is planned for, activities are broken into component parts, tasks are assigned priorities and an estimated time for completion, and time schedule is developed. Allow for additional student autonomy as skills develop.

7. Display cartoons and bulletin board items illustrating all of the courteous and businesslike manners.

8. Have a businessperson speak on attitudes desired in a beginning employee.

9. Provide a role model by practicing courteous and businesslike procedures in your teaching.

10. Use employee evaluation forms collected from businesses and available in the Arizona Business Occupations Competency-Based Curriculum Guide and the Common Core Curriculum.

11. Ask the school nurse or other health occupations individual to present a program on good personal health techniques.

12. Present a fashion show of appropriate office/business dress for the class. This could be shared with other classes and/or the vocational organizations. Makeup is easily added to this presentation.

13. Discuss current laws regarding OSHA and office safety.

INSTRUCTIONAL EQUIPMENT, MATERIALS, AND SUPPLIES:

1. Checklists, worksheets, evaluation forms, bulletin board displays, classroom timer or stopwatch. Telephone training equipment (optional).

RESOURCES:

ARIZONA BUSINESS OCCUPATIONS COMPETENCY-BASED CURRICULUM GUIDE. Arizona Department of Education, Phoenix, AZ. Pages HR 1-18, COE 33-49, O/M 17-18, CA/I 2. 1980-81.

ARIZONA BUSINESS OCCUPATIONS COMON-CORE COMPETENCY INSTRUCTION MODULES. Arizona Department of Education, Phoenix, AZ. Chapter--Human Relations/Personal Skills, pages 1-43. 1982.

Bixler, Susan. THE PROFESSIONAL IMAGE. South-Western Publishing Company, Cincinnati, OH. 1985.

Daggett, W. R. THE DYNAMICS OF WORK. South-Western Publishing Company, Cincinnati, OH. 1984.

Fruehling, Rosemary T., and Constance K. Weaver. ELECTRONIC OFFICE PROCEDURES. Gregg/McGraw-Hill Book Company, Novato, CA. 1987.

Fulton, Patsy J., Joanna D. Hanks, J. Sargeant Reynolds. PROCEDURES FOR THE PROFESSIONAL SECRETARY. South-Western Publishing Company, Cincinnati, OH. 1985.

Golden, Nancy J. DRESS RIGHT FOR BUSINESS. Gregg/McGraw-Hill Book Company, Novato, CA. 1986.

Hampton, D. R. MANAGEMENT. Gregg/McGraw-Hill Book Company, Novato, CA. 3RD ED. 1986.

Keeling, B. L., and N. F. Kallaus. ADMINISTRATIVE OFFICE MANAGEMENT. South-Western Publishing Company, Cincinnati, OH. 1984.

Kutie, Rita C., and Joan L. Rhodes. SECRETARIAL PROCEDURES FOR THE ELECTRONIC OFFICE. John Wiley & Sons, Inc., New York, N.Y. 2ND ED. 1986.

Luke, Cheryl M., and C. B. Stiegler. OFFICE SYSTEMS AND PROCEDURES. Houghton Mifflin Company, Boston, MA. 1986.

Moon, H. R. OFFICE PROCEDURES AND TECHNOLOGY. MPC Educational Publishers, Bronx, N.Y. Date unavailable.

Shinn, George. LEADERSHIP DEVELOPMENT. Gregg/McGraw-Hill Book Company, Novato, CA. 2ND ED. 1986.

2.0 **COMPETENCY/SKILL:** Uses personal responsibility skills.

2.2 **TASK:** Uses effective time management.

PERFORMANCE OBJECTIVE:

See Receptionist 2.2.

CONDITIONS:

EVALUATION:

STANDARD:

STUDENT LEARNING EXPERIENCES:

SUGGESTED INSTRUCTIONAL TECHNIQUES:

INSTRUCTIONAL EQUIPMENT, MATERIALS, AND SUPPLIES:

RESOURCES:

2.0 **COMPETENCY/SKILL:** Uses personal responsibility skills.

2.3 **TASK:** Maintains familiarity with personnel policies.

PERFORMANCE OBJECTIVE:

CONDITIONS: Given a list of situations involving the identified personnel policies and a list of solutions based on good personnel practices,

EVALUATION: matches the situations to the desired solutions,

STANDARD: with 85 percent accuracy.

STUDENT LEARNING EXPERIENCES:

1. Maintain awareness of job progression and opportunities.

2. Use current legal regulations, policies and procedures related to the work of the office.

3. Identify and follows the chain of command in all work situations in the organizational structure.

4. Create and maintain a positive company image.

SUGGESTED INSTRUCTIONAL TECHNIQUES:

See Receptionist 1.3

INSTRUCTIONAL EQUIPMENT, MATERIALS, AND SUPPLIES:

See Receptionist 1.3

RESOURCES:

ARIZONA BUSINESS OCCUPATIONS COMPETENCY-BASED CURRICULUM GUIDE. Arizona Department of Education, Phoenix, AZ. 1980-81.

Fruehling, Rosemary T., and Constance K. Weaver. ELECTRONIC OFFICE PROCEDURES. Gregg/McGraw-Hill Book Company, Novato, CA. 1987.

Fulton, Patsy J., Joanna D. Hanks, J. Sargeant Reynolds. PROCEDURES FOR THE PROFESSIONAL SECRETARY. South-Western Publishing Company, Cincinnati, OH. 1985.

Kutie, Rita C., and Joan L. Rhodes. SECRETARIAL PROCEDURES FOR THE ELECTRONIC OFFICE. John Wiley & Sons, Inc., New York, NY 2ND ED. 1986.

Luke, Cheryl M., and C. B. Stiegler. OFFICE SYSTEMS AND PROCEDURES. Houghton Mifflin Company, Boston, MA. 1986.

Rosen, Arnold, Eileen Feretic, Margaret H. Bahniuk. ADMINISTRATIVE PROCEDURES FOR THE ELECTRONIC OFFICE. John Wiley & Sons, Inc., New York, NY. 2ND ED. 1985.

3.0 **COMPETENCY/SKILL:** Uses office equipment to complete job tasks.

3.1 **TASK:** Operates electric/electronic typewriter to prepare business documents.

PERFORMANCE OBJECTIVE:

CONDITIONS: Given a rough-draft form letter, 3 variable information items, and 5 addresses,

EVALUATION: prepares form letter with coded stops or blanks for variable information and addresses,

STANDARD: in mailable form within 30 minutes.

STUDENT LEARNING EXPERIENCES:

1. See Receptionist 3.1.
2. Keyboard form letters requiring paragraphs and fill in information.
3. Keyboard summary of minutes of meeting or conference, meeting agendas and itineraries.
4. Keyboard end-of-month reports and financial reports.

SUGGESTED INSTRUCTIONAL TECHNIQUES:

1. Assign students to conduct a mock meeting with half the class preparing minutes and half preparing sample financial reports. All students then prepare a cover letter to accompany these reports and enclosures. Students will select the best minutes and the best financial reports to attach to their cover letters. Letter will be sent to three different people using a form letter format and personalizing each.

INSTRUCTIONAL EQUIPMENT, MATERIALS, AND SUPPLIES:

1. Electric/Electronic typewriter.

RESOURCES:

ARIZONA BUSINESS OCCUPATIONS COMPETENCY-BASED CURRICULUM GUIDE, Arizona Department of Education, Phoenix, AZ. Pages T 25-26. 1980-81.

Crawford, T. James, Lawrence W. Erickson, Jerry W. Robinson, Lee R. Beaumont, Arnola C. Ovnby. MICROCOMPUTER KEYBOARDING FORMATTING APPLICATION. South-Western Publishing Company, Cincinnati, OH. 1986.

Farmer, Grahm. KEYBOARDING: AN INTRODUCTORY COURSE. Jenkins Forkner Publishing Corporation, Agincourt, Ontario, Canada. 1985.

Lloyd, A. L., F. E. Winger, R. P. Poland, R. N. Hanson, A. Rossetti, S. Ober, J. L. Rowe. GREGG COLLEGE TYPING, SERIES FIVE. Gregg/McGraw-Hill Book Company, Novato, CA. 1985.

Lloyd, A. L., F. E. Winger, J. E. Johnson, R. A. Hall, P. C. Morrison, J. L. Rowe. GREGG TYPING, SERIES SEVEN. Gregg/McGraw-Hill Book Company, Novato, CA. 1985.

Simcoe, Annell L., Leona M. Gallion, Carol Mauermeyer, Joanne Sanvardine. KEYBOARDING FOR THE AUTOMATED OFFICE. John Wiley & Sons, Inc., New York, NY. 1986

3.0 **COMPETENCY/SKILL:** Uses office equipment to complete job tasks.

3.2 **TASK:** Operates an electronic calculator by touch.

PERFORMANCE OBJECTIVE:

See Receptionist 3.2.

CONDITIONS:

EVALUATION:

STANDARD:

STUDENT LEARNING EXPERIENCES:

SUGGESTED INSTRUCTIONAL TECHNIQUES:

INSTRUCTIONAL EQUIPMENT, MATERIALS, AND SUPPLIES:

RESOURCES:

3.0 **COMPETENCY/SKILL:** Uses office equipment to complete job tasks.

3.3 **TASK:** Operates a Copier.

PERFORMANCE OBJECTIVE:

CONDITIONS: Given a case study involving materials to be duplicated and descriptions of distribution guidelines,

EVALUATION: decides what methods to use for reproducing documents, number of copies, and distribution list.

STANDARD: Consider timelines, cost, appearance, and quality according to instructor standards.

STUDENT LEARNING EXPERIENCES:

1. See Receptionist 3.3.
2. Decide what materials need to be copied and least expensive method of duplicating.
3. Determine duplication method most suited for documents.
4. Produce professional-looking copies by carefully proofreading the copy and by making sure the original or master is neat in form and appearance.
8. Collate, bind and fold material.
9. Distribute information to appropriate person and/or department.
10. Use services of print shop.

SUGGESTED INSTRUCTIONAL TECHNIQUES:

1. Discuss latest technology in coping process including: microcomputers, facsimile, laser, satallite, ink jet spray, desk top publishing printers, and fiber obtics.

2. Discuss waste involved in making too many copies, discuss the paperless office where materials are stored on disc, tape or other magnetic media, also discuss electronic mail as a means of eliminating unnecessary copying.

INSTRUCTIONAL EQUIPMENT, MATERIALS, AND SUPPLIES:

1. Copier.

2. Films are available from IBM, and the telephone company on fiber optics, laser printing and satellite communications.

RESOURCES:

Kupsh, Joyce, and Sandra Whitcomb. THE ELECTRONIC OFFICE. Glencoe Publishing Company, Encino, CA. Date unavailable.

Moon, H. R. OFFICE PROCEDURES AND TECHNOLOGY. MPC Educational Publishers, Bronx, NY. Date unavailable.

Pasevark, William R. REPROGRAPHICS: COPIER, OFFSET, STENCIL, FLUID. South-Western Publishing Company, Cincinnati, OH. 3RD ED. 1984.

Quible, Zane K. ADMINISTRATIVE OFFICE MANAGEMENT: AN INTRODUCTION. Reston Publishing Company, Reston, Virginia. 3RD ED. 1984.

Tedesco, Eleanor H. ADMINISTRATIVE OFFICE MANAGEMENT: THE ELECTRONIC OFFICE. John Wiley & Sons, Inc., New York, NY. 1984.

3.0 **COMPETENCY/SKILL:** Uses office equipment to complete job tasks.

3.4 **TASK:** Understands the concept of an information system and the elements comprising it.

PERFORMANCE OBJECTIVE:

CONDITIONS: Given a list of 50 terms used in the information processing technology and 50 definitions for the terms,

EVALUATION: matches terms with definitions,

STANDARD: with 80 percent accuracy.

STUDENT LEARNING EXPERIENCES:

1. Read current periodicals containing articles about office automation.

2. Understand the document cycle: Input, processing, storage, output, and distribution.

3. Is aware of new technologies in communication, voice processing, fiber optics, image processing, satellite communication.

4. Understand the concept of networks.

5. Is familiar with data bases, how to access them, how to manipulate files within data bases.

6. Understand and accept changes that may occur as electronic technology continues to have an impact of the secretarial/administrative assistant role.

SUGGESTED INSTRUCTIONAL TECHNIQUES:

1. Textbooks are of limited value in this field as they are usually outdated when they are published. Select the latest text available and supplement with films, periodicals, video tapes, field trips, and guest speakers.

2. Vendors are often willing to come in to demonstrate the latest equipment. The telephone company has some excellent films on communication via satellite and using fiber optics.

INSTRUCTIONAL EQUIPMENT, MATERIALS, AND SUPPLIES:

RESOURCES:

3.0 **COMPETENCY/SKILL:** Uses office equipment to complete job tasks.

3.5 **TASK:** Uses information processor to prepare business documents.

PERFORMANCE OBJECTIVE:

CONDITIONS: Given a 3-page rough draft manuscript,

EVALUATION: records, edits, prints, and stores document,

STANDARD: with final copy error free, titled, and logged according to procedure determined by instructor.

STUDENT LEARNING EXPERIENCES:

1. Activate information processor using appropriate control keys to prepare equipment for processing information.

2. Load software using appropriate commands to access software functions.

3. Input information using keyboard to record document.

4. Proofread and edit text, print a copy and store the document.

SUGGESTED INSTRUCTIONAL TECHNIQUES:

1. Present new material in generic terms. Use vendor manuals for reference only. Students should understand terminollogy and processes-- not a specific piece of equipment.

2. Explain the document cycle.

INSTRUCTIONAL EQUIPMENT, MATERIALS, AND SUPPLIES:

1. Word processor, micro-computer, or combination, software for word processor.

RESOURCES:

ARIZONA BUSINESS OCCUPATIONS COMPETENCY-BASED CURRICULUM GUIDE. Arizona Department of Education, Phoenix, AZ. Pages 25-35. 1980-81.

Baber, Lina Grace. WORD/INFORMATION PROCESSING: CONCEPTS AND APPLICATIONS. Bobbs-Merrill Publishing Company, Indianopolis, IN. 1984.

Bergerud, M. L., and J. Gonzalez. WORD PROCESSING CONCEPTS AND CAREERS: A STEP TOWARD OFFICE AUTOMATION. John Wiley & Sons, Inc., New York, NY. 3RD ED. 1984.

Brooks, Lloyd D. 101 WORD PROCESSING EXERCISES. Gregg/McGraw-Hill Book Company, Novato, CA. 1986.

Casady. M. J., and D. Sandburg. WORD/INFORMATION PROCESSING--A SYSTEM APPROACH. South-Western Publishing Company, Cincinnati, OH. 1985.

Casady, Mona. WORD/INFORMATION PROCESSING CONCEPTS. South-Western Publishing Company, Cincinnati, OH. 2ND ED. 1984.

Clark, James F., and Judith J. Lambrecht. INFORMATION PROCESSING: CONCEPTS, PRINCIPLES, AND PROCEDURES. South-Western Publishing Company, Cincinnati, OH. 1985.

Ettinger, Blanche, and Edda Perfetto. MACHINE TRANSCRIPTION: LANGUAGE SKILLS FOR INFORMATION PROCESSING. Science Reasearch Associates, Inc., Chicago, IL. 1984.

Hawkins and Bloom. OCEANVIEW ASSOCIATES, INC.: A WORD PROCESSING PRACTICE SET. The H. M. Rowe Company, Baltimore, MD. 1984.

Lucas, Henry C. INFORMATION SYSTEMS CONCEPTS FOR MANAGEMENT. Gregg/McGraw-Hill Book Company, Novato, CA. 3RD ED. 1986.

Sherster, J. A. SUN ISLAND HOTEL: A WORD PROCESSING SIMULATIONS. Harcourt Brace Jovanovich, Orlando, FL. 1986.

Varner, J. T. WORD PROCESSING OPERATIONS: DOCUMENT PREPARATION. Science Research Associates, Inc., Chicago, IL. Date unavailable.

3.0 **COMPETENCY/SKILL:** Uses office equipment to complete job tasks.

3.6 **TASK:** Manipulates files using keyboard commands to merge stored information.

PERFORMANCE OBJECTIVE:

CONDITIONS: Given a rough-draft letter and a list of addresses,

EVALUATION: keyboards, edits, and merges letter file with the file containing addresses,

STANDARD: in mailable form within the time established by the instructor which is appropriate for the system used.

STUDENT LEARNING EXPERIENCES:

1. Copy stored data using information from one file to copy into another file.

2. Record information regarding files location--log or record of files.

3. Select blocks of information using text editing techniques to prepare a new printed document.

4. Assemble information from any media using keyboard techniques to prepare a new printed document.

SUGGESTED INSTRUCTIONAL TECHNIQUES:

1. Keep the approach generic when explaining merge functions. Use the vendor manual for references only. Explain that other equipment will require other procedures.

2. After students have recorded documents and address lists and prepared logs, have them exchange log records and access data files recorded by other students.

INSTRUCTIONAL EQUIPMENT, MATERIALS, AND SUPPLIES:

1. Word processor, microcomputer, software.

RESOURCES:

ARIZONA BUSINESS OCCUPATIONS COMPETENCY-BASED CURRICULUM GUIDE. Arizona Department of Education, Phoenix, AZ. Pages W/IP 6, 7 and 36-45. 1980-81.

See Task 3.4.

3.0 **COMPETENCY/SKILL:** Uses office equipment to complete job tasks.

3.7 **TASK:** Maintains records and files using knowledge of records management to store retrieve and purge information.

PERFORMANCE OBJECTIVE:

CONDITIONS: Given a list or directory of information stored on media and a description of the information including date and subject,

EVALUATION: determines which documents may be deleted,

STANDARD: with 90 percent accuracy and with NO vital or essential documents which are essential, vital, necessary, etc.

STUDENT LEARNING EXPERIENCES:

1. Reviev the Americal Records Management Associations's list of documents which are essential, vital, necessary, etc.

2. Reviev their ovn log of documents and determine vhich are no longer needed and purge the file of unnecessary documents.

3. Retrieve documents vhich they have recorded and given a log or directory, vill be able to retrieve documents stored by other students.

SUGGESTED INSTRUCTIONAL TECHNIQUES:

See Task 3.5 and 3.6.

INSTRUCTIONAL EQUIPMENT, MATERIALS, AND SUPPLIES:

See Task 3.1.

RESOURCES:

See Task 3.0 and 3.4.

3.0 **COMPETENCY/SKILL:** Uses office equipment to complete job tasks.

3.8 **TASK:** Applies efficient dictation/transcription procedures.

PERFORMANCE OBJECTIVE:

CONDITIONS: Given brief notes and instructions to send a letter,

EVALUATION: dictates letter using a recorder/transcriber and then transcribes the letter,

STANDARD: in mailable form within 30 minutes.

STUDENT LEARNING EXPERIENCES:

1. Set up transcription unit including properly attaching foot pedal, listening device, inserting software, and adjusting volume, tone and speed controls.

2. Dictate from prepared documents and later brief notes remembering to:
   a. identify self;
   b. indicates the type of document (letter, memo, report);
   c give complete instruction to the transcriptionist regarding number of copies, carbon copies required, and enclosures;
   d. controls voice level and rate;
   e. spells appropriate words and names;
   f. indicates paragraphs, special punctuation and capitalization.

SUGGESTED INSTRUCTIONAL TECHNIQUES:

1. Present an overview of machines in the classroom displaying pictures of available units on the market. Discuss disc, belt and cassette equipment.

2. Review the importance of using reference materials for format, punctuation, usage, etc.

3. Dictate from complete document at first, later progressing to point at which students will be able to dictate with brief notes only.

INSTRUCTIONAL EQUIPMENT, MATERIALS, AND SUPPLIES:

1. Dictation/transcription machine, cassettes, discs, or belts as needed.

RESOURCES:

Fruehling, Rosemary T., and Constance K. Weaver. ELECTRONIC OFFICE PROCEDURES. Gregg/McGraw-Hill Book Company, Novato, CA. 1987.

Kmech, Visaggi. COMPREHENSIVE MACHINE TRANSCRIPTION COURSE. Dictation Disc Company, New York, NY. Date unavailable.

3.0 **COMPETENCY/SKILL:** Uses office equipment to complete job tasks.

3.9 **TASK:** Corrects minor office machine malfunctions and if malfunction cannot be corrected by the operator, reports it to a service firm.

PERFORMANCE OBJECTIVE:

CONDITIONS: Given a list of equipment identifying a malfunction in each,

EVALUATION: identifies possible steps to repair and identifies which equipment will need service firm repairs.

STANDARD: According to instructor standards.

STUDENT LEARNING EXPERIENCES:

1. Change ribbons, fonts, correction ribbons and clean fonts and plantens.

2. Demonstrate proper handling of disks and identify damaged disks.

3. Locate brightness control on CRT's and demonstrate usage.

4. Be aware of basic correction steps to handle misfunction of display and nondisplay information processing equipment.

SUGGESTED INSTRUCTIONAL TECHNIQUES:

1. Demonstration on equipment for basic repairs.

2. Invite a service repair representative to demonstrate checks which should be made on equipment before calling a repair/service firm.

3. Stress the importance of careful handling of all magnetic media and electronic equipment. Point out costs to the employer for service/maintenance contract.

INSTRUCTIONAL EQUIPMENT, MATERIALS, AND SUPPLIES:

1. Cleaning supplies and tools, ribbons for typewriters, calculators, microcomputers, and word processors.

RESOURCES:

Quible, Zane K. ADDMINISTRATIVE OFFICE MANAGEMENT: AN INTRODUCTION. Reston Publishing Company, Reston, VA. 3RD ED. 1984.

Waggoner, Kathleen P., and Mary M. Ruprecht. OFFICE AUTOMATION: A MANAGEMENT APPROACH. John Wiley & Sons, Inc., New York, NY. 1984.

4.0 **COMPETENCY/SKILL:** Applies principles of records filing.

4.1 **TASK:** Indexes, codes, and files documents for alphabetic, numeric, subject chronological, and geographical filing.

PERFORMANCE OBJECTIVE:

See Receptionist 4.1.

CONDITIONS:

EVALUATION:

STANDARD:

STUDENT LEARNING EXPERIENCES:

SUGGESTED INSTRUCTIONAL TECHNIQUES:

INSTRUCTIONAL EQUIPMENT, MATERIALS, AND SUPPLIES:

RESOURCES:

4.0 **COMPETENCY/SKILL:** Applies principles of records filing.

4.2 **TASK:** Maintains filing system

PERFORMANCE OBJECTIVE:

See Receptionist 4.2.

CONDITIONS:

EVALUATION:

STANDARD:

STUDENT LEARNING EXPERIENCES:

SUGGESTED INSTRUCTIONAL TECHNIQUES:

INSTRUCTIONAL EQUIPMENT, MATERIALS, AND SUPPLIES:

RESOURCES:

4.0 **COMPETENCY/SKILL:** Applies principles of records filing.

4.3 **TASK:** Determines records filing needs; recommends and establishes a records management system.

PERFORMANCE OBJECTIVE:

CONDITIONS: Given a case study, or actual business situation,

EVALUATION: writes a proposal recommending a records management system,

STANDARD: considering legislative mandates, need, budget, personnel, and future growth according to business or instructor criteria.

STUDENT LEARNING EXPERIENCES:

1. Decide whether to use a centralized or decentralized filing system or both.

2. Develop a system of storing records and identifying which records will be kept.

3. Select the types of storage that provides the easiest and fastest means of retrieval.

4. Interpret legislation regarding records retention, information privacy and protection, and industrial security.

5. Keep business documents and records secure and confidential.

SUGGESTED INSTRUCTIONAL TECHNIQUES:

1. Use a combination of class discussion, case problems, cartoons, films, and demonstrations to illustrate how records can be lost, destroyed, or changed.

2. Discuss the Privacy Act and Freedom of Information Act.

3. List the kinds of records they now have of a personal nature and classify them as necessary, essential, vital, and discuss guidelines for destruction of each.

INSTRUCTIONAL EQUIPMENT, MATERIALS, AND SUPPLIES:

1. Vendor catalogs.

2. Samples of: file folders, labels, microfiche, microfilm, and magnetic storage media.

3. See Information Sheet, back of this unit.

RESOURCES:

Fosegan, Joseph S. ALPHABETIC INDEXING RULES--APPLICATION BY COMPUTER. South-Western Publishing Company, Cincinnati, OH. 1984.

Fulton, Patsy J., Joanna D. Hanks, J. Sargeant Reynolds. PROCEDURES FOR THE PROFESSIONAL SECRETARY. South-Western Publishing Company, Cincinnati, OH. 1985.

Holmes. FILING MADE EASY: A FILING SIMULATION. Houghton Mifflin Company, Boston, MA. 2ND ED. 1985.

Kupsh, Joyce, and Sandra Whitcomb. THE ELECTRONIC OFFICE. Glencoe Publishing Company, Encino, CA. Date unavailable.

Luke, Cheryl M., and C. B. Stiegler. OFFICE SYSTEMS AND PROCEDURES. Houghton Mifflin Company, Boston, MA. 1986.

Rosen, Arnold, Eileen Feretic, Margaret H. Bahniuk. ADMINISTRATIVE PROCEDURES FOR THE ELECTRONIC OFFICE. John Wiley & Sons, Inc., New York, NY. 2ND ED. 1985.

Tedesco, Eleanor H. ADMINISTRATIVE OFFICE MANAGEMENT: THE ELECTRONIC OFFICE. John Wiley & Sons, Inc., New York, NY. 1984.

Waggoner, Kathleen P., and Mary M. Ruprecht. OFFICE AUTOMATION: A MANAGEMENT APPROACH. John Wiley & Sons, Inc., New York, NY. 1984.

4.0 **COMPETENCY/SKILL:** Applies principles of records filing.

4.4 **TASK:** Revises a filing system.

PERFORMANCE OBJECTIVE:

CONDITIONS: Given a list of documents and a description of the information in each document including date and subject,

EVALUATION: determines storage media, length of time document is to be stored, level of confidentiality, and method of destruction,

STANDARD: with 100 percent accuracy.

STUDENT LEARNING EXPERIENCES:

1. Use cross-reference and index files.
2. Protect documents from damage or loss.
3. Determine how long records should be stored.
4. Determine level of confidentiality for documents.

SUGGESTED INSTRUCTIONAL TECHNIQUES:

1. Assign a brief report comparing systems, transfer methods, archives, methods of destruction. Assign reading from current periodicals regarding new methods of records management.

INSTRUCTIONAL EQUIPMENT, MATERIALS, AND SUPPLIES:

1. Periodicals, videotapes.

RESOURCES:

See Task 4.3.

CROSS-REFERENCING

You should always index and code a document by the caption under which it is most likely to be requested from the files. However, when a document may be called for by two or more different ways, it should be filed under the most frequently used caption and cross-referenced under the others.

Cross-referencing must be done with discretion. Too much cross-referencing requires considerable filing time as well as filing space, but too little cross-referencing may delay retrieval. A general rule to follow is: "When in doubt, cross-reference".

Cross-references are usually prepared in this types of situations:

1. unusual and foreign names;
2. women known by both their legal and married names;
3. business names composed of two or more surnames of people;
4. names of firms doing business under more than one name;
5. names of firms that are affiliates or braches of other firms;
6. an organization referred to by initials because it is better known that way (IBM: International Business Machines Corporation);
7. company names that have been changed;
8. when correspondence pertaining to individuals is filed by subject;
9. foreign language names of businesses and government agencies;
10. when confusion exists over a filing rule.

When preparing a document for cross-referencing, you should first code the document as usual. Indicate the cross-reference caption by underlining it with a wavy line or writing it on the paper. Place and "x" at the end of the line or after the written caption to show that it is a cross-reference caption.

The actual cross-reference can be done in one of four ways:

1. Cross-reference sheets (often a different color) may be used. On these sheets is recorded information about the original document--the original file name, its location, the date, and a brief description of the document.
2. Facsimile copies may be used. Actual copies of the original document are made and filed in the alternate locations(s). This method is more expensive, but the searcher has to look in only one place for the information.
3. Permanent cross-reference guides may be used. These are manila cards the same size as file folders with identical tabs, that are inserted in place of a folder in the cross-reference location(s).
4. Cross-reference notations can be indicated on the accompanying card index file.

Cross-referencing for numeric and subject filing is done automatically by their accompanying indexes.

STORING SPECIAL-PURPOSE RECORDS

The greatest number of records stored in most offices are paper records stored in filing drawers or shelves. However, with the widespread use of data processing, word processing, transcription, and micrographics equipment in modern offices, many kinds of special-purpose records must also be stored. This may include disks, cassettes, aperture cards, blueprints, charts, computer printouts, dictated belts and disks, microfiche, magnetic cards and tapes, and microfilm reels, cartridges, or cassettes.

DISKS are used with data processing and work processing equipment. FLOPPY DISKS (also called diskettes or floppies) are small, flexible sheets of magnetic material on which relatively large amounts of data can be stored. They are so pliable that they must be in a firm holder to handle. Floppy disks may be kept in a protective envelope holder in a desk-top file box or in ring binders with see-through pockets. They may also be placed in folders which have a pocket for each disk and another pocket for the hard copy. These folders may be filed in three-ring notebooks, in drawer files, attached to rigid panels suspended in drawers, attached to a carousel, placed in a fan file that lies flat, or placed in pockets that flip from side to side in an upright stand. MINIDISKS (or minidiskettes) are another type of magnetic media used in word processing and are smaller that floppy disks. Minidisks may be filed in the same manner as floppies, housed in pockets on a hanging page, or in pockets on panels in a rotary holder.

CASSETTES should be filed so that their magnetic tapes are locked into a safe position which will prevent unwinding and protect against dirt. They may be placed into albums or binders, hanging panels in file drawers, carousels or rotary files, small shelves, and divided drawers or cabinets.

APERTURE CARDS are punched cards with an opening (aperture) into which a frame of film is mounted. They are usually housed in drawers in the same size as the cards. Printed information across the top of each card shows in code or adbreviated from the subject of the film contained on the card.

BLUEPRINTS, CHARTS, DRAWING, MAPS, ETC., are best filed flat in shallow drawers in cabinets specially made for the purpose, or hung vertically by hooks or claps attached to a binder or rack.

COMPUTER PRINTOUTS are usually kept in binders with special prongs that fit into the holes on the sides of the sheets. These binders may then be hooked over rods in file drawers or moveable carts, or stored in open-shelf cabinets.

BELTS, DISKS, AND RECORDS USED IN DICTATION AND TRANSCRIPTION are usually retained for a specified length of time after transcription and filed in a temporary container (box, drawer, or file folder). They are either arranged chronologically or alphabetically by the names of the people originating the dictation.

MICROFICHE (oftened shortened to FICHE) are four by six inch cards that contain many individual microimages (pieces of film) which are usually filed in small filing cabinets or racks. The information stored on the fiche can be read with a magnifying viewer which may print out copies of the desired information.

141

MAGNETIC (MAG) CARDS are another type of media used in word processing to record and store information. The cards are similar to punched cards, and are usually kept by word processing operators in a box or tray on their desks, or in three-ring notebooks with pages of envelopes.

MAGNETIC TAPE is used to store the results of processing done by a computer and is stored on reels in round metal boxes that rest either on a slanting shelf or in holders attached to a shelf.

Records photographed on MICROFILM REELS, CARTRIDGES, AND CASSETTES are usually stored in boxes on shelves or in partitioned cabinets. They may be arranged in carousels, desk-top units, or floor units.

The filing process for special-purpose records is more time-consuming than for papers. Inspection includes checking to see that the item is undamaged and complete, clean, and properly encased. Items are indexed and coded, and cross-referenced to the original source if they are copies. It is very important to label each record properly, since it is otherwise impossible to determine what information is stored on the record. Special-purpose records should be filed as soon as possible after they are received for filing. Whenever a record is removed from its filing place, a requisition form and charge-out system should be used. These records can be filed in most any method (alphabetic, numeric, geographic, or chronological) as long as they are properly labeled and cross-referenced.

MICROGRAPHICS AND COMPUTER FILING

The volume of records that businesses must keep in order to operate efficiently is rapidly growing. Because of the problem with storage and retrieval that this creates, businesses are exploring new methods of storage. One popular alternative is COMPUTER FILING, since computer records take up very little space and can be retrieved quickly. Information in a computer filing system can be coded or punched onto computer cards and stored in vertical files. Cards are stored in removable trays in the drawers of filing cabinets. When information is needed, the cards are inserted into the computer. Magnetic tapes and disks can hold more information in less space that punched cards. Tapes and disks are usually stored in fire and heat-resistant cabinets or safes. Retrieval of information stored in a computer is quite fast. When information is requested, it may be printed out or shown on a visual display screen.

Another method of storing information in an efficient manner is micrographics. Through MICROGRAPHICS, information is recorded in reduced form on film by using a photographic process (microfilming). The original records are reduced to a very small size, are called MICRORECORDS, and include roll film, microfiche, and aperture cards.

Machines are very important in a microrecord system. Equipment is used in each phase of the creation and use of microrecords: filming, duplicating, reading, printing, retrieving, and storing. Specialized CAMERAS are used in the filming process. Four types of DUPLICATORS may be utilized, those that make copies: 1. from roll film to roll film; 2. from fiche to fiche; 3. from aperture card to roll film; and 4. from roll film to aperture card. Once the film is developed, a READER OR VIEWER is needed to display the microimage in enlarged form on a screen for vieving. When a copy or print of the record is needed, a READER-PRINTER is used, because it can both enlarge the microrecord on a vieving screen and print a hard copy of the record. RETRIEVAL EQUIPMENT is needed to locate the records stored in microform. Special containers are used to STORE the various types of microrecords, including boxes, cases, binders, cabinets, carousels, and shelves.

Indexing is a basic step in microrecord storage, but it is much different than the indexing of paper records. Three common methods of indexing microrecords are: flash target indexing, code line indexing, and image count indexing. The FLASH TARGET method is used for microfilm (roll or cartridge). Each 100-foot length of film is divided into five 10-foot lengths with a flash area separating each length of film. An alphabetic or numeric filing key is created from which labels for each microfilm storage container can be prepared. With CODE-LINE INDEXING, records are filmed using a special camera with high density lights that form code lines between each microimage. With IMAGE COUNT INDEXING, an index code number is automatically assigned by the camera to each document during the microfilming process.

Methods have been developed that combine the microfilming process with a computer, making the storage and retrieval of microrecords a speedy, inexpensive, efficient operation. CAR, OR COMPUTER ASSISTED RETRIEVAL is when the computer obtains the desired information from records stored on magnetic tapes or disks and produces it for you in readable form. COM, OR COMPUTER OUTPUT MICROFILM (or microfiche) allows information to be printed

on microforms for use and storage. The computer processes the desired information into a form readable by the microform processing units, which then produces the desired microform. WPOM, OR WORD PROCESSING ON MICROFILM, converts information on word processing magnetic media to microfilm for use and storage.

Two types of AUTOMATED RETRIEVAL EQUIPMENT can be used to store and retrieve microrecords: self-contained equipment and remote-controlled equipment. The microrecords being retrieved are actually contained within SELF-CONTAINED EQUIPMENT. With REMOTE-CONTROLLED EQUIPMENT, the retrieval device searches for microrecords that are contained in another piece of equipment.

AUTOMATED FILING UNITS can be obtained with various levels of sophistication that permit instant retrieval and increase efficiency. These systems may hold computer tapes, cards, or regular folders. Automated systems have these advantages: they can be locked for security purposes; they are more convenient and comfortable to work with; they save space; they are more attractive than conventional filing cabinets and fit into the modern open setting; and physically handicapped people can easily work with the files.

*SECRETARIAL OCCUPATIONS V-TECS GUIDE.

KEEPING CONFIDENTIAL FILES

All records of an organization are considered valuable, or they would not be in the files. However, some records may be marked "confidential, classified, secret, vital, personal," etc. The filing worker must be sure not to release any of these records from the files without the proper authority.

In some offices, a request bearing the signature of a designated officer of the organization is required to release confidential records. In other offices, a variety of people are allowed access to all or certain types of information from the confidential files, and a list of these people and the types of information that can be released to each is furnished to the filing worker.

Some records are so protected that they are not to be taken from the files under any circumstances. In this case, the person must have a request form signed by someone in authority and must inspect the record at the filing site.

When confidential records are allowed away from the filing site, they must usually be returned to the files at the end of the working day. Some memory device should be used by the filing worker as a reminder of what materials are out of the files and due back each day.

The requisition form and charge-out procedure for confidential records is the same as for regular files. However, care must be taken to release such files only to personnel on the release list. When materials are returned, they must be inspected to ensure completeness and locked back into the files. The log book used to record confidential materials releases should either be locked up or kept in a safe place so that it cannot be tampered.

*SECRETARIAL OCCUPATIONS V-TECS GUIDE.

RETENTION, TRANSFER, AND DISPOSAL OF RECORDS

In most offices, the space that can be devoted to filing is limited. Records that are used frequently should be stored in easily accessible filing cabinets, and are called ACTIVE FILES. Because this valuable space is soon taken up, some provision must be made to move lesser-used files to another location for storage (INACTIVE FILES). Records that are no longer needed may be destroyed.

The decision on how long to keep different types of records of an organization is its RECORDS RETENTION policy. The usefulness of the records, legal requirements, and other factors determine this policy. The length of time that records are kept in active, inactive, or transfer files before destroying them is called the RENTENTION PERIOD. A RENTENTION SCHEDULE specifies how long each type of active record is to be held for reference, the length of time it is to be held in storage for semiactive reference, and when the record may be destroyed.

Some records must be kept permanently, some for three to twenty years, and others for only a short period of time. Some records may be destroyed without ever being stored. The retention period for different types of records is determined by how vital they are to the organization. There are four main categories of records:

1. VITAL RECORDS are essential to the existence of the organization and cannot be replaced if destroyed. Vital records should never be transferred or destroyed, and should be kept in a vault or safe for protection from fire, theft, or other disasters. Some examples of vital records are: corporate charter, deeds, mortgages, bills of sale for major transactions, tax returns, stocks and bonds, copyrights or trademark registrations, and minute books of meetings of boards of directors and stockholders.
2. IMPORTANT RECORDS help keep the business running smoothly and routinely. These records could be replaced at much cost and delay, and may be transferred if inactive and placed in containers that will keep them in good condition. Examples of important records are: accounts receivable and accounts payable ledgers, canceled checks, inventory records, invoices, payroll records, and purchase orders. These records may be kept for about six or seven years.
3. USEFUL RECORDS are temporarily helpful to the business and could be replaced at slight cost. They are usually kept for one to three years. Examples of useful records are: bank statements, employment applications, expired insurance policies, petty cash vouchers, receiving records, and general correspondence.
4. NONESSENTIAL PAPERS can be destroyed after temporary use, without ever being stored. Examples are: answers to routine inquires, simple acknowledgements, bulletin-board announcements, reminders of meeting, etc.

The following questions must be considered in order to determine whether records should be transferred from the active files to inactive files:

1. How valuable is the record? Is it worth the cost of keeping it?
2. How often is the record used?

3. Where should the record be stored?
4. Must the record be kept for legal purposes?
5. Has the organization set requirements for keeping this record?
6. Should the record be destroyed? If yes, when? If no, what precautions must be taken to saveguard the record?

Organizations use two general methods of transfer--perpetual and periodic. The one selected will depend on the nature and frequency of reference to the records, the space available to store records, and the filing system being used.

PERPETUAL TRANSFER is a method of continually transferring records to inactive storage as a project or case is completed. While a suitable method for lawyers, construction companies, etc., that operate on this basis, it is not practical for most offices since it requires the continuous review and transfer of files. With the perpetual method, records that are semi-active may have already been transferred to inactive, and much time can be lost getting the records back together if a project or case needs to be investigated or reopened at a later date.

PERIODIC TRANSFER is the removal of papers at the end of a stated filing period (say, every six months or the end of the year) from the active files to less expensive transfer files or inactive files. There are three periodic transfer methods used: one-period, two-period, and maximun-minimum period. Under the ONE-PERIOD TRANSFER METHOD, ALL records are removed from the active files and transferred to the storage files in one operation. No consideration is given to recent papers that may be in the files and may be needed for future reference. This method saves time and space, but frequent trips to the storage center to locate needed materials may be necessary. The TWO-PERIOD TRANSFER METHOD provides matching storage space for the inactive files near the active files. At stated intervals, all inactive files are moved to a storage location, active files are transferred to the inactive section, and new files are set up in the active drawers. This method keeps the records of two periods handy, even though they are separated. With the MAXIMUM-MINIMUM TRANSFER METHOD, active materials are kept in the active files for the minimum time set, but no paper is kept beyond the maximum time set. When the transfer is made, the most recent papers are kept in the active files with those dated after the cut-off (maximum) date placed in the inactive files.

The term DISPOSAL means discarding or destroying records that are no longer useful. RECORDS SHOULD NEVER BE DESTROYED WITHOUT THE PROPER AUTHORITY, IN WRITING, TO DO SO. Disposing of records may mean simply throwing them away, or maintaining confidentiality by shredding or disintegrating them.

These steps should generally be followed to prepare for the transfer process:

1. Depending on the transfer plan being used, determine which files are ready to be transferred and assemble them.
2. Prepare new folders and labels to replace those being transferred.
3. Assemble transfer boxes and label, or prepare inactive drawers.
4. Remove the files from the file drawers and place them in the transfer boxes or inactive file drawers.

5. Inventory the contents of each box or drawer and make a list of the contents for future reference.
6. Label each box or drawer clearly.
7. Dispose of any records that are no longer needed. (Make sure you have written authority before destroying any records!)

Always follow the retention schedule prepared by an authorized supervisor.

5.0 **COMPETENCY/SKILL:** Uses reference materials.

5.1 **TASK:** Uses telephone directories.

PERFORMANCE OBJECTIVE:

See: Receptionist 5.1.

CONDITIONS:

EVALUATION:

STANDARD:

STUDENT LEARNING EXPERIENCES:

SUGGESTED INSTRUCTIONAL TECHNIQUES:

INSTRUCTIONAL EQUIPMENT, MATERIALS, AND SUPPLIES:

RESOURCES:

5.0 **COMPETENCY/SKILL:** Uses reference materials.

5.2 **TASK:** Uses and maintains company directory, city directory, and a zip code directory.

PERFORMANCE OBJECTIVE:

See: Receptionist 5.2.

CONDITIONS:

EVALUATION:

STANDARD:

STUDENT LEARNING EXPERIENCES:

SUGGESTED INSTRUCTIONAL TECHNIQUES:

INSTRUCTIONAL EQUIPMENT, MATERIALS, AND SUPPLIES:

RESOURCES:

5.0 **COMPETENCY/SKILL:** Uses reference materials.

5.3 **TASK:** Uses dictionary, atlas, maps, and timetables.

PERFORMANCE OBJECTIVE:

See: Receptionist 5.3.

CONDITIONS:

EVALUATION:

STANDARD:

STUDENT LEARNING EXPERIENCES:

SUGGESTED INSTRUCTIONAL TECHNIQUES:

INSTRUCTIONAL EQUIPMENT, MATERIALS, AND SUPPLIES:

RESOURCES:

5.0 **COMPETENCY/SKILL:** Uses reference materials.

5.4 **TASK:** Keeps numbers and addresses necessary for emergencies in a convenient place for quick reference.

PERFORMANCE OBJECTIVE:

See: Receptionist 5.4

CONDITIONS:

EVALUATION:

STANDARD:

STUDENT LEARNING EXPERIENCES:

SUGGESTED INSTRUCTIONAL TECHNIQUES:

INSTRUCTIONAL EQUIPMENT, MATERIALS, AND SUPPLIES:

RESOURCES:

6.0 **COMPETENCY/SKILL:** Organizes work area.

6.1 **TASK:** Keeps desk neat and arranges for coverage of desk at all times.

PERFORMANCE OBJECTIVE:

See: Receptionist 6.2.

CONDITIONS:

EVALUATION:

STANDARD:

STUDENT LEARNING EXPERIENCES:

SUGGESTED INSTRUCTIONAL TECHNIQUES:

INSTRUCTIONAL EQUIPMENT, MATERIALS, AND SUPPLIES:

RESOURCES:

7.0 **COMPETENCY/SKILL:** Schedules appointments following company procedures.

7.1 **TASK:** Makes appointments requested by executive.

PERFORMANCE OBJECTIVE:

See: Receptionist 7.1.

CONDITIONS:

EVALUATION:

STANDARD:

STUDENT LEARNING EXPERIENCES:

SUGGESTED INSTRUCTIONAL TECHNIQUES:

INSTRUCTIONAL EQUIPMENT, MATERIALS, AND SUPPLIES:

RESOURCES:

7.0 **COMPETENCY/SKILL:** Schedules appointments following company procedures.

7.2 **TASK:** Makes appointments for others to see executive.

PERFORMANCE OBJECTIVE:

See: Receptionist 7.2.

CONDITIONS:

EVALUATION:

STANDARD:

STUDENT LEARNING EXPERIENCES:

SUGGESTED INSTRUCTIONAL TECHNIQUES:

INSTRUCTIONAL EQUIPMENT, MATERIALS, AND SUPPLIES:

RESOURCES:

7.0 **COMPETENCY/SKILL:** Schedules appointments following company procedures.

7.3 **TASK:** Reschedules future appointments.

PERFORMANCE OBJECTIVE:

See: Receptionist 7.3.

CONDITIONS:

EVALUATION:

STANDARD:

STUDENT LEARNING EXPERIENCES:

SUGGESTED INSTRUCTIONAL TECHNIQUES:

INSTRUCTIONAL EQUIPMENT, MATERIALS, AND SUPPLIES:

RESOURCES:

8.0 **COMPETENCY/SKILL:** Receives and places telephone calls.

8.1 **TASK:** Describes telephone services available and how they are used.

PERFORMANCE OBJECTIVE:

See: Receptionist 8.1.

CONDITIONS:

EVALUATION:

STANDARD:

STUDENT LEARNING EXPERIENCES:

SUGGESTED INSTRUCTIONAL TECHNIQUES:

INSTRUCTIONAL EQUIPMENT, MATERIALS, AND SUPPLIES:

RESOURCES:

8.0 **COMPETENCY/SKILL:** Receives and places telephone calls.

8.2 **TASK:** Places outgoing calls.

PERFORMANCE OBJECTIVE:

See: Receptionist 8.2.

CONDITIONS:

EVALUATION:

STANDARD:

STUDENT LEARNING EXPERIENCES:

SUGGESTED INSTRUCTIONAL TECHNIQUES:

INSTRUCTIONAL EQUIPMENT, MATERIALS, AND SUPPLIES:

RESOURCES:

8.0 **COMPETENCY/SKILL:** Receives and places telephone calls.

8.3 **TASK:** Answers telephone.

PERFORMANCE OBJECTIVE:

See: Receptionist 8.3.

CONDITIONS:

EVALUATION:

STANDARD:

STUDENT LEARNING EXPERIENCES:

SUGGESTED INSTRUCTIONAL TECHNIQUES:

INSTRUCTIONAL EQUIPMENT, MATERIALS, AND SUPPLIES:

RESOURCES:

8.0 **COMPETENCY/SKILL:** Receives and places telephone calls.

8.4 **TASK:** Transfers calls.

PERFORMANCE OBJECTIVE:

See: Receptionist 8.4.

CONDITIONS:

EVALUATION:

STANDARD:

STUDENT LEARNING EXPERIENCES:

SUGGESTED INSTRUCTIONAL TECHNIQUES:

INSTRUCTIONAL EQUIPMENT, MATERIALS, AND SUPPLIES:

RESOURCES:

8.0 **COMPETENCY/SKILL:** Receives and places telephone calls.

8.5 **TASK:** Takes messages.

PERFORMANCE OBJECTIVE:

See: Receptionist 8.5.

CONDITIONS:

EVALUATION:

STANDARD:

STUDENT LEARNING EXPERIENCES:

SUGGESTED INSTRUCTIONAL TECHNIQUES:

INSTRUCTIONAL EQUIPMENT, MATERIALS, AND SUPPLIES:

RESOURCES:

8.0 **COMPETENCY/SKILL:** Receives and places telephone calls.

8.6 **TASK:** Receives telephone calls for visitors during meeting.

PERFORMANCE OBJECTIVE:

See: Receptionist 8.6.

CONDITIONS:

EVALUATION:

STANDARD:

STUDENT LEARNING EXPERIENCES:

SUGGESTED INSTRUCTIONAL TECHNIQUES:

INSTRUCTIONAL EQUIPMENT, MATERIALS, AND SUPPLIES:

RESOURCES:

9.0 **COMPETENCY/SKILL:** Receives visitors to the office.

9.1 **TASK:** Greets visitors and determines purpose of the visit.

PERFORMANCE OBJECTIVE:

See: Receptionist 9.1.

CONDITIONS:

EVALUATION:

STANDARD:

STUDENT LEARNING EXPERIENCES:

SUGGESTED INSTRUCTIONAL TECHNIQUES:

INSTRUCTIONAL EQUIPMENT, MATERIALS, AND SUPPLIES:

RESOURCES:

9.0 **COMPETENCY/SKILL:** Receives visitors to the office.

9.2 **TASK:** Applies company policies and executive preference regarding an unscheduled visitor.

PERFORMANCE OBJECTIVE:

See: Receptionist 9.2.

CONDITIONS:

EVALUATION:

STANDARD:

STUDENT LEARNING EXPERIENCES:

SUGGESTED INSTRUCTIONAL TECHNIQUES:

INSTRUCTIONAL EQUIPMENT, MATERIALS, AND SUPPLIES:

RESOURCES:

9.0 **COMPETENCY/SKILL:** Receives visitors to the office.

9.3 **TASK:** Applies company policies and executive preference regarding a scheduled visitor.

PERFORMANCE OBJECTIVE:

See: Receptionist 9.3.

CONDITIONS:

EVALUATION:

STANDARD:

STUDENT LEARNING EXPERIENCES:

SUGGESTED INSTRUCTIONAL TECHNIQUES:

INSTRUCTIONAL EQUIPMENT, MATERIALS, AND SUPPLIES:

RESOURCES:

9.0 **COMPETENCY/SKILL:** Receives visitors to the office.

9.4 **TASK:** Manages visitors who are waiting in the reception room.

PERFORMANCE OBJECTIVE:

See: Receptionist 9.4.

CONDITIONS:

EVALUATION:

STANDARD:

STUDENT LEARNING EXPERIENCES:

SUGGESTED INSTRUCTIONAL TECHNIQUES:

INSTRUCTIONAL EQUIPMENT, MATERIALS, AND SUPPLIES:

RESOURCES:

10.0 **COMPETENCY/SKILL:** Processes mail following company procedures.

10.1 **TASK:** Processes incoming mail based on the employer's need.

PERFORMANCE OBJECTIVE:

CONDITIONS: Given an in-basket activity consisting of an assortment of 25 pieces of incoming mail,

EVALUATION: sorts, processes, and distributes the mail to the correct department/individual.

STANDARD: At 90 percent accuracy.

STUDENT LEARNING EXPERIENCES:

1. See Receptionist 10.1.
2. Read, underline, annotate contents of incoming mail if company policy permits.
3. Attache related correspondence.
4. Acknowledge letters and inquiries during the executives's absence or gives urgent letters to an associate for immediate action.

SUGGESTED INSTRUCTIONAL TECHNIQUES:

1. Develop a list of the steps involved in processing incoming mail to use as a checklist for processing activities.

2. Simulate incoming mail items and procedures so that students have a chance to handle a variety of mail items.

3. Collect various classes of mail as examples, display as bulletin board items.

4. Discuss and demonstrate use of mail registers.

5. Ask school administrator to allow the class to sort the school mail as a learning activity.

6. Distribute case problems that involve student decision making. Examples:
   a. missing enclosures;
   b. routing;
   c. annotation;
   d. procedures for acknowledging letters during an executive's absence.

7. Respond orally and in writing or refer to an associate mail received during the executive's absence.

8. Review composition and oral techniques necessary to complete acknowledgment letters or calls during an executive's absence.

INSTRUCTIONAL EQUIPMENT, MATERIALS, AND SUPPLIES:

See Receptionist 10.1.

RESOURCES:

ARIZONA BUSINESS OCCUPATIONS COMPETENCY-BASED CURRICULUM GUIDE. Arizona Department of Education, Phoenix, AZ. Pages MP 1-15. 1980-81.

Luke, Cheryl M., and C. B. Stiegler. OFFICE SYSTEMS AND PROCEDURES. Houghton Mifflin Company, Boston, MA. 1986.

Moon, H. R. OFFICE PROCEDURES AND TECHNOLOGY. MPC Educational Publishers, Bronx, NY. Date unavailable.

Rosen, Arnold, Eileen Feretic, Margaret H. Bahniuk. ADMINISTRATIVE PROCEDURES FOR THE ELECTRONIC OFFICE. John Wiley & Sons, Inc., New York, NY. 2ND ED. 1985.

See Receptionist 10.1.

10.0 **COMPETENCY/SKILL:** Processes mail following company procedures.

10.2 **TASK:** Processes outgoing mail based on employer's need.

PERFORMANCE OBJECTIVE:

See Receptionist 10.2.

CONDITIONS:

EVALUATION:

STANDARD:

STUDENT LEARNING EXPERIENCES:

SUGGESTED INSTRUCTIONAL TECHNIQUES:

INSTRUCTIONAL EQUIPMENT, MATERIALS, AND SUPPLIES:

RESOURCES:

10.0 **COMPETENCY/SKILL:** Processes mail following company procedure.

10.3 **TASK:** Prepares parcels and packages carefully so that the contents will be delivered quickly and in good condition.

PERFORMANCE OBJECTIVE:

CONDITIONS: Given a list of steps in preparing parcels and packages for the mail,

EVALUATION: arranges the items in correct sequence,

STANDARD: with 100 percent accuracy.

STUDENT LEARNING EXPERIENCES:

1. Develop a list of steps in preparing packages and parcels for mailing form materials from the US Postal Service.

2. Wrap or describe the procedure for wrapping packages and parcels for mailing.

SUGGESTED INSTRUCTIONAL TECHNIQUES:

1. Obtain wrapping and packaging directions from the US Postal Services. Distribute copies to students.

2. Prepare bulletin board illustrating preparation of parcels and packages for mailing.

INSTRUCTIONAL EQUIPMENT, MATERIALS, AND SUPPLIES:

See Receptionist 10.1

RESOURCES:

ARIZONA BUSINESS OCCUPATIONS COMPETENCY-BASED CURRICULUM GUIDE. Arizona Department of Education, Phoenix, AZ. Pages MP 1-14. 1980-81.

See Task 10.1.

10.0 **COMPETENCY/SKILL:** Processes mail following company procedure.

10.4 **TASK:** Files return insurance and registerd mail receipts.

PERFORMANCE OBJECTIVE:

CONDITIONS: Given a list of 25 sample receipts and a list of 100 company names,

EVALUATION: identifies the correct company name under which to file the mailing receipts,

STANDARD: at 90 percent accuracy.

STUDENT LEARNING EXPERIENCES:

1. Identify the types of receipts available through the Post office.

2. Review filing rules in order to correctly file receipts. See Receptionist 4.1 and 4.2.

SUGGESTED INSTRUCTIONAL TECHNIQUES:

See Receptionist 4.1 and 4.2.

INSTRUCTIONAL EQUIPMENT, MATERIALS, AND SUPPLIES:

1. Sample receipts from the Post Office, copies for students, a set of office files (or a list).

RESOURCES:

ARIZONA BUSINESS OCCUPATIONS COMPETENCY-BASED CURRICULUM GUIDE. Arizona Department of Education, Phoenix, AZ. 1980-81.

See Task 10.1.

10.0 **COMPETENCY/SKILL:** Processes mail following company procedure.

10.5 **TASK:** Transmits mail electronically.

PERFORMANCE OBJECTIVE:

CONDITIONS: Given a list of items to send electronically and a list of facsimile systems and computer-based services,

EVALUATION: matches the items to the system and services,

STANDARD: at 85 percent accuracy.

STUDENT LEARNING EXPERIENCES:

1. Use facsimile systems to send copies of handwritten, typewritten, graphics and photographic materials to distant locations over telephone lines whenever possible.

2. Use computer-based message service.

3. Prepare documents for simulated facsimile or computer distribution.

SUGGESTED INSTRUCTIONAL TECHNIQUES:

1. Discuss the relative merits of the various facsimile systems for sending handwritten, typewritten, graphics and photographic materials.

2. Discuss the relative merits of the various computer-based message services available.

3. Bring in guest speakers and demonstrations to illustrate these services.

4. Display cartoons and bulletin board materials.

5. Gather samples of COM (computer output mail).

INSTRUCTIONAL EQUIPMENT, MATERIALS, AND SUPPLIES:

1. Connections with facsimile systems in the classroom, or access to these systems within the school/district.

2. Connections with a computer-based message service in the classroom, or access to these services within the school/district.

3. Telephone training equipment and modem (optional).

RESOURCES:

ARIZONA BUSINESS OCCUPATIONS COMPETENCY-BASED CURRICULUM GUIDE. Arizona Department of Education, Phoenix, AZ. 1980-81.

Lucas, Henry C. INFORMATION SYSTEMS CONCEPTS FOR MANAGEMENT. Gregg/McGraw-Hill Book Company, Novato, CA. 3RD ED. 1986.

Waggoner, Kathleen P., and Mary M. Ruprecht, OFFICE AUTOMATION: A MANAGEMENT APPROACH. John Wiley & Sons, Inc., New York, NY. 1984.

11.0 **COMPETENCY/SKILL:** Applies principles of financial record keeping.

11.1 **TASK:** Maintains petty cash fund.

PERFORMANCE OBJECTIVE:

CONDITIONS: Given a list of 9 petty cash transactions,

EVALUATION: determines the amount to replenish the fund to a cash balance of $100,

STANDARD: with 100 percent accuracy.

STUDENT LEARNING EXPERIENCES:

1. Count the cash in petty cash box.
2. Prepare a petty cash voucher.
3. Prepare a petty cash record.
4. Calculate the balance in the fund.
5. Prepare documents necessary to obtain funds to replenish petty cash.

SUGGESTED INSTRUCTIONAL TECHNIQUES:

1. Divide the class into small groups. Give each group a petty cash fund (imitation money) of $100, petty cash vouchers, receipts, petty cash record sheet, and a number of expenses to pay. (One unallovable transaction.) Within each group students are to handle these transactions. After completing these petty cash items, each group completes the petty cash record replenishing the fund. Activity may be extended over several class meetings, with cash fund box being kept in the classroom.

INSTRUCTIONAL EQUIPMENT, MATERIALS, AND SUPPLIES:

1. Petty cash boxes, imitation money (bills and coins) petty cash vouchers, petty cash records.

RESOURCES:

Fuller, Robert W. PAYROLL PROCEDURES. South-Western Publishing Company , Cincinnati, OH. 9TH ED. 1985.

Moon, H. R. OFFICE PROCEDURES AND TECHNOLOGY. MPC Educational Publishers, Bronx, NY. Date unavailable.

Palmer, C. E., and V. A. Pacey. ACCOUNTING FOR THE MODERN OFFICE. Gregg/McGraw-Hill Book Company, Novato, CA. 1985.

Rosenberg, H. J., C. C. Swinney, S. Van Sickle. PROJECTS IN BUSINESS RECORD KEEPING. South-Western Publishing Company, Cincinnati, OH. 5TH ED. 1985.

11.0 **COMPETENCY/SKILL:** Applies principles of financial recordkeeping.

11.2 **TASK:** Maintains a checkbook.

PERFORMANCE OBJECTIVE:

CONDITIONS: Given a checkbook, deposit slips, a stated amount of currency, coins, and checks, a list of invoices to be paid, and a bank statement.

EVALUATION: Prepares a deposit slip, writes checks to pay invoices, and reconciles the bank statement,

STANDARD: with deposits accurate, checks legible and complete, and new checkbook balance matching bank balance.

STUDENT LEARNING EXPERIENCES:

1. Write Checks.
2. Prepare deposit slips.
3. Endorse checks.
4. Keep check register.
5. Reconcile bank statements.

SUGGESTED INSTRUCTIONAL TECHNIQUES:

1. Use transparencies to illustrate writing a check and completing the register.
2. Invite a bank official to speak to class regarding bank experiences with incorrect check-writing procedures.
3. Write checks to other students who will endorse and deposit them in a checking account.

INSTRUCTIONAL EQUIPMENT, MATERIALS, AND SUPPLIES:

1. Checkbook with blank checks, deposit slips and register. Imitation coins, currency, bank reconciliation forms.

RESOURCES:

ARIZONA BUSINESS OCCUPATIONS COMPETENCY-BASED CURRICULUM GUIDE. Arizona Department of Education, Phoenix, AZ. Pages RK 4, 5, and 9-11.

See Task 11.1.

11.0 **COMPETENCY/SKILL:** Applies principles of financial recordkeeping.

11.3 **TASK:** Prepares Payroll.

PERFORMANCE OBJECTIVE:

CONDITIONS: Given the time cards, rates of pay, and company policy for computing hours,

EVALUATION: calculates the number of regular, overtime and total hour worked and the gross earnings,

STANDARD: with 100 percent accuracy.

STUDENT LEARNING EXPERIENCES:

1. Calculate weekly earnings using time cards.
2. Calculate earnings at regular, overtime and total hours.

SUGGESTED INSTRUCTIONAL TECHNIQUES:

1. Suggest to the students who do not have a social security number that they apply for a social security card.
2. Secure W-4 and W-4E form for the students to complete.
3. Distribute a weekly time card to each student. Using each class period as an 8-hour day, have students keep record of their hour for the week. Tardies should be reflected in the "time in". Dock 15 minutes for each minute late.
4. Discuss hov wages and hours worked are affected by federal regulations.

INSTRUCTIONAL EQUIPMENT, MATERIALS, AND SUPPLIES:

1. Time cards, W-4 form, W-4E forms.

RESOURCES:

See Task 11.1.

12.0 **COMPETENCY/SKILL:** Maintains office supplies.

12.1 **TASK:** Orders and receives office supplies.

PERFORMANCE OBJECTIVE:

CONDITIONS: Given a list of items to order, 3 blank purchase orders, a list of supplies received and 3 invoices,

EVALUATION: prepares the purchase orders, and check the list of supplies received against the invoices.

STANDARD: Purchase order forms must be typed accurately with novisible error, and the invoices and supplies checked accurately.

STUDENT LEARNING EXPERIENCES:

1. Prepare purchase orders.
2. Identify type of supplies needed, and the best vendor to order form.
3. Check invoice quantity, price and total against original purchase order.
4. Proofread purchase orders.

SUGGESTED INSTRUCTIONAL TECHNIQUES:

1. Use newspaper advertisements with percentages to provide practice exercises in calculating discounts.

2. Secure copies of trade catalogs for classroom use in calculating trade discounts and drill exercises. Have students do comparative shopping from catalogs.

3. Review math as necessary to calculate discounts applying addition, multiplication, division and decimals as needed.

4. Set up a chronological file to be used when processing invoices for payment in simulated activites.

INSTRUCTIONAL EQUIPMENT, MATERIALS, AND SUPPLIES:

1. Blank purchase order forms, completed invoices, supply catalogs, file folders for chronological files for purchase orders.

RESOURCES:

ARIZONA BUSINESS OCCUPATIONS COMPETENCY-BASED CURRICULUM GUIDE. Arizona Department of Education, Phoenix, AZ. Pages RK 6, 7. 1980-81.

Quible, Zane K. ADDMINISTRATIVE OFFICE MANAGEMENT: AN INTRODUCTION. Reston Publishing Company, Reston, VA. 3RD ED. 1984.

12.0 **COMPETENCY/SKILL:** Maintains office supplies.

12.2 **TASK:** Maintains office inventory of supplies.

PERFORMANCE OBJECTIVE:

CONDITIONS: Given inventory cards with items listed and quantity to be on hand,

EVALUATION: computes items needed to bring inventory to desired level and determines which supplier to use considering price, quality, and shelf-life,

STANDARD: with 90 percent accuracy.

STUDENT LEARNING EXPERIENCES:

1. Identify equipment and supplies needed for the office.

2. Describe criteria for equipment and supplies.

3. Compare cost of inventory items, considering shelf-life, quality, warranties, a suitability for the business.

4. Calculate need-to-have item costs and nice-to-have item costs for an effective office operation.

SUGGESTED INSTRUCTIONAL TECHNIQUES:

1. Invite supply company representatives to visit the class and discuss current office needs.

2. Discuss supply costs, importance of controlling those costs, ethics regarding using business supplies for personal use.

INSTRUCTIONAL EQUIPMENT, MATERIALS, AND SUPPLIES:

1. Inventory cards (physical and perpetual), office equipment, and supply catalogs.

RESOURCES:

ARIZONA BUSINESS OCCUPATIONS COMPETENCY-BASED CURRICULUM GUIDE. Arizona Department of Education, Phoenix, AZ. Pages RK 6, 7, 8, and 14. 1980-81.

See Task 12.1.

13.0 **COMPETENCY/SKILL:** Coordinates travel arrangements.

13.1 **TASK:** Uses knowledge of time zones, passports, visas and innoculations in arranging travel (domestic and foreign).

PERFORMANCE OBJECTIVE:

CONDITIONS: Given an executive's requirements for travel to Japan,

EVALUATION: arranges for airline transportation, ground transportation, hotel reservations, necessary appointments, and prepares appropriate ininerary.

STANDARD: Considering time zones, passport or visa requirements, innoculations, meeting location, interpreter (if needed) and any special arrangements to be made during executive's absence to instructor specifications.

STUDENT LEARNING EXPERIENCES:

1. Understand time zones.
2. Use reference materials to determine need of passports, visas, innoculation or other medical requirements.
3. Is familiar with travel agencies and airline and ground transportation requirements.
4. Use telephone or telex or computer to make hotel reservations.
5. Shop for competitive rates on car rental, airfare, etc. and purchases tickets.
6. Understand company policy regarding expense reports, necessary receipts.
7. Prepare itinerary.
8. Compile and type expense reports.
9. Set up a file to keep all information related to a particular trip.

SUGGESTED INSTRUCTIONAL TECHNIQUES:

1. Invite a local travel agent in to discuss with the class travel options, the airfare war, impact of deregulation on the industry, the impact of automation and home computers on the travel industry, and general travel hints.

2. Divide the class into small groups, give them the assignment of arranging for executive travel, and have them list the steps they would take to make arrangements. Give bonus points to the group presenting the most complete list.

3. Clip any newspaper articles regarding travel abuse by politicians or other executives. Discuss the ethics of travel expenses for personal travel. Discuss the impact of recent tax legislation on executive/business travel.

INSTRUCTIONAL EQUIPMENT, MATERIALS, AND SUPPLIES:

1. Telephone book, travel guide, atlas, typewriter or word/information processor.

2. See Information Sheets, end of this unit.

RESOURCES:

Booher, Dianna. THE NEW SECRETARY. Facts on File Publications. 1985.

Fulton, Patsy J., Joanna D. Hanks, J. Sargeant Reynolds. PROCEDURES FOR THE PROFESSIONAL SECRETARY. South-Western Publishing Company, Cincinnati, OH. 1985.

Luke, Cheryl M., and C. B. Stiegler. OFFICE SYSTEMS AND PROCEDURES. Houghton Mifflin Company, Boston, MA. 1986.

Moon, H. R. OFFICE PROCEDURES AND TECHNOLOGY. MPC Educational Publishers, Bronx, NY. Date unavailable.

Rosen, Arnold, Eileen Feretic, Margaret H. Bahniuk. ADMINISTRATIVE PROCEDURES FOR THE ELECTRONIC OFFICE. John Wiley & Sons, Inc., New York, NY. 2ND ED. 1985.

13.0 **COMPETENCY/SKILL:** Coordinates travel arrangements.

13.2 **TASK:** Organizes and packs materials relating to business activities that are necessary to make the trip successful.

PERFORMANCE OBJECTIVE:

CONDITIONS: Given a case study including an itinerary for an executive,

EVALUATION: determines what materials need to be gathered and given to the executive upon departure.

STANDARD: List all necessary items and including any appropriate extras.

STUDENT LEARNING EXPERIENCES:

1. Maintain file for executive trip including all necessary tickets, car rental or ground transportation reservations, hotel/motel/lodging reservations, itinerary, maps of city or destination area, telephone numbers including area codes for any family members, business executives, company addresses, emergency numbers, correspondence relating to travel.

2. Prepare materials in order needed by executive.

3. Arrange for portable computer, dictation equipment, or other hardware necessary for travel.

4. Purchase traveler's checks, prepays hotels, arranges for company credit cards, as provided for in company policy.

5. Prepare packet for receipts and other necessary items needed to prepare travel expense report.

SUGGESTED INSTRUCTIONAL TECHNIQUES:

1. Invite an executive to speak about travel discussing items which are critical to productive travel, those which are useful and those which are nice to have.

INSTRUCTIONAL EQUIPMENT, MATERIALS, AND SUPPLIES:

See Task 13.1.

RESOURCES:

Fulton, Patsy J., Joanna D. Hanks, J. Sargeant Reynolds. PROCEDURES FOR THE PROFESSIONAL SECRETARY. South-Western Publishing Company, Cincinnati, OH. 1985.

Moon, H. R. OFFICE PROCEDURES AND TECHNOLOGY. MPC Educational Publishers, Bronx, NY. Date unavailable.

Rosen, Arnold, Eileen Feretic, Margaret H. Bahniuk. ADMINISTRATIVE PROCEDURES FOR THE ELECTRONIC OFFICE. John Wiley & Sons, Inc., New York, NY. 2ND ED. 1985.

13.0 **COMPETENCY/SKILL:** Coordinates travel arrangements.

13.3 **TASK:** Coordinates the tasks necessary to maintain a smooth and continuous work flow in the executive's absence.

PERFORMANCE OBJECTIVE:

CONDITIONS: Given the assignment to make arrangements for work flow, during executives absence, an organizational chart, a company policy handbook, and an executive calendar,

EVALUATION: lists assignments to personnel on organizational chart, prepares chart listing, persons responsible for executives duties, check calendar for appointment cancellations.

STANDARD: Following company policy , accounting for each area of responsibility, and canceling all obligations during executive's absence.

STUDENT LEARNING EXPERIENCES:

1. Note executives responsibilities.
2. Determine who is most logical to carry out those responsibilities.
3. Provide phone numbers to executive and secures numbers for reaching executive in case of emergency.
4. Check calendar and cancel any appointments set during executive's absence.
5. Make a list of tasks executive wishes completed during the absence.
6. Understand company policy and follows it.

SUGGESTED INSTRUCTIONAL TECHNIQUES:

1. Assign students to make arrangements for instructor's absence, accounting for lesson plan roll call, lecture/demonstration, etc.

2. Brainstorm on things an executive might need to have done while absent. Divide class into teams and have them identify who might do each item.

3. Discuss how secretary should handle emergencies which might arise during executives absence. Identify those which could be handled without executive and those which would require contacting the executive at the conference site.

INSTRUCTIONAL EQUIPMENT, MATERIALS, AND SUPPLIES:

RESOURCES:

13.0 **COMPETENCY/SKILL:** Coordinates travel arrangements.

13.4 **TASK:** Performs follow-up activities resulting from the trip.

PERFORMANCE OBJECTIVE:

CONDITIONS: Given a case study involving employer travel, including a description of events which took place during the employer's absence,

EVALUATION: makes notes of important events, prepares a brief report for employer.

STANDARD: Use correct grammar, punctuation, spelling, usage and include all important items.

STUDENT LEARNING EXPERIENCES:

1. Keep notes of visitors, important phone calls, and requests.

2. Compile and type expense reports.

3. Bring employer up to date on activities that have occurred during the absence.

SUGGESTED INSTRUCTIONAL TECHNIQUES:

1. General discussion of possible events that need to be reported to the employer and those which are incidental and do not need to be reported.

2. Assign students to give reports to students who have missed a class. Evaluate the report in terms of accuracy and completeness. Use peer evaluation to determine if the report was complete, accurate and included all pertinent events that took place during the class.

INSTRUCTIONAL EQUIPMENT, MATERIALS, AND SUPPLIES:

1. Case studies.

RESOURCES:

TRAVEL ARRANGEMENTS

Because of the competitive nature of today's business, executives must be prepared for extensive travel--often on short notice. Office workers assigned to handle travel arrangements need to keep abreast of changes in transportation, lodging, and dining services. These employees also need to possess the know-how and skills necessary in handling specialized travel arrangements. The following procedure will enable travel support staff to be better organized and more efficient;

1. Become familiar with company travel policies and employer preferences.
2. Gather data required to make arrangements (dates, time, and places).
3. Make the necessary reservations and obtain tickets well in advance.
4. Arrange mutually agreeable appointments with the party(ies) to be visited.
5. Obtain confirmations.
6. Prepare an itinerary (detailed plan of trip).
7. Prepare all necessary travel advance forms.
8. Check with your employer to see if appointments are to be scheduled before and after the trip and to determine which materials should be included in the employer's travel folder.
9. When your employer returns, provide him/her with an office update (verbal or writen).
10. Perform follow-up functions.

Follow-up functions may include putting away material that your employer has accumulated while away, distributing pertinent data to associates, preparing reimbursement forms, and writing thank you notes or letters. Keep notes on satisfactory accommodations and arrangements for future reference.

To keep abreast of changes in transportation and accommodation services, employees responsible for travel arrangements should have up-to-date reference materials in the office. The HOTEL AND MOTEL REDBOOK, a handy lodging reference, can be purchased from the New York American Hotel Association--Directory Association, 880 Seventh Avenue, New York, NY 10019. American Express Reservations, Inc., Box G-10, 770 Broadway, New York, NY 10003, publishes a worldwide hotel directory that may be obtained free of charge. Reuben H. Donnelly, 2000 Clearwater Drive, Oak Brook, IL 60521, publishes the OFFICIAL AIRLINE GUIDE, which contains information on airport locations in North America, schedules and fares, limousine and car rental services, hotels, and air travel facilities.

Executives are avare of the fact that poor human relations result in lost dollars, so an organization cannot afford travel services that result in missed connections or inappropriate lodging. To avoid conflict due to constant changes in service and rate schedules, firms may decide to use the services of a travel agent. The American Society of Travel Agents (ASTA), a professional association for travel agents, may be able to recommend agents in your area. ASTA requires that agents have a minimum of three years of experience in business and hold an appointment by at least two major transportation conferences, one of which must be either the Air Traffic Conference or the International Transport Association. Agent membership with this society usually assures dependable service. Some agents may receive specialized training in travel and tourism from the Intitute of Certified Travel Agents, identified by the intitals "CTC" after their names.

Many organizations have their own travel departments that plan itineraries and make all travel and hotel reservations for their employees. To use this service, you call the department and indicate that you wish to make travel arrangements for your employer, giving all pertinent details. Someone in the travel department will prepare the possible schedules that are available through the carriers and submit them to you for your employer's approval. As soon as a schedule is approved, ask the travel department to make the necessary reservations and obtain the tickets.

In some organizations, a TRAVEL REQUEST APPROVAL FORM must be completed and approved before an employee makes a business trip. This form simply shows where the employee is going, the purpose of the trip, and the estimated costs of the trip, and must be approved by someone high in the organization.

Before the employee leaves on a business trip, she/he may wish to prepare a TRAVEL ADVANCE FORM in order to have cash available on the trip. This form tells where the employee is going and how much money is needed for the trip in advance, and must also be approved by someone with that authouity in the organization. Upon returning from the trip, the employee either pays back any money not spent for the trip, or requests reimbursement for additional expenses above the advanced amount. In some organization, the employee may be authorized to use a company credit card for all expenses on the trip, so any advance is not necessary. In organizations where an advance is not allowed, the empoyee may use his/her personal credit cards and file for reimbursement of expenses after completing the trip.

A TRAVEL VOUCHER, or request for reimbursement of travel expenses, is submitted when an employee returns from a business trip. This form gives all details of the trip with receipts attached, and shows the exact costs of the trip. The travel voucher is further explained in the following information sheet.

With the increase in the volume of international trade, many organizations have operations in foreign countries. Foreign travel will necessitate special documents. Executives must make aplications for a PASSPORT in their native country. The US State Department issues passports in the United States. Application form can be obtained from the local county clerk of courts office, local travel agencies, or from a US Post Office. A fee, pictures (expecially taken for passport purposes), proof of birth (a birth certificate or naturalization papers), and return postage are submitted to the Passport Division of the United States State Department in Washington, DC 20524. Passports are valid for a duration of five years.

Foreign travel may also require a VISA. Visas can be obtained from the foreign country's consulate office. In addition, travelers driving in foreign countries will need an international driver's license and may be required to show health certificates that verify inoculations. Be sure to apply for passports and visas well in advance of the trip, since receipt can be very slow.

Even if the office worker can rely on the organization's travel department or a travel agent when planning a trip, she/he is responsible for checking the completeness and accuracy of the final arrangements. Just before your employer leaves on a business trip, you must check the tickets, get money for the trip (if necessary), prepare an itinerary, assemble materials for

the trip, and get instructions about any special responsibilities you may have in your employer's absence. An ITINERARY shows when, where, and how your employer will travel, and details about appointments and materials needed. In addition to the itinerary, compile all materials needed, and put the papers for each appointment in a separate envelope or folder. Make sure your employer gets everything she/he needs in a briefcase before leaving on the trip.

Take notes as your employer gives instructions about what to do in his/her absence. Find out what, if any, mail should be forwarded or responded to; what to do about meetings your employer cannot attend; correspondence and phone calls to be taken care of; and any special task you must handle while she/he is gone. Stay at your desk and work at the same pace while your employer is away to keep the office current. Allow time to communicate with the executive who is in charge of carrying out your employer's duties while she/he is away. If your employer wishes, set up prearranged times to communicate with him/her about what is going on in the office.

Plan your schedule so that you can spend ther first day your employer is back in the office following through on work generated by the trip. Brief your employer on what happened at the office during his/her absence, present the mail in a priority sequence, file materials that are brought back from the trip along with materials that were taken, and prepare the employer's expense report. You may also wish to send thank you notes to people who were entertaining your employer while she/ he was traveling.

*SECRETARIAL OCCUPATIONS V-TECS GUIDE.

TRAVEL VOUCHERS

Most organizations reimburse employees' travel expenses after a business trip. Reimbursement may be in addition to, or instead of, cash in advance. To complete travel vouchers for the employer, the office worker must collect the necessary data receipts. It is advisable that the executive maintain an expense log, but you may be expected to keep track of these expenses as the employer submits receipts. Regulations and expenses procedures vary from firm to firm. Some may require receipts for every expense, others for amounts in excess of a pre-established dollar amount, and others only for specific expenditures. Your employer may submit travel vouchers on a scheduled basis--bi-weekly or monthly, or after returning from each trip. The completed form will show total expenses less prepaid, charged, and advanced expenses. In addition, many businesses request that entertainment expenses be explained in detail and that their benefits to the business be justified.

Travel vouchers should be completed promptly so that your employer can be reimbursed. Confer with your employer and obtain all the necessary data. Steps that will aid you in this process may include:

1. Obtain relevant data from your employer.
2. Sort and categorize receipts according to the function and the sequence in which they occurred.
3. Complete separate expense/voucher forms for each trip.
4. Obtain the necessary approval signatures and route.

A copy of the expense report and receipts should be retained in the office for future reference. If your employer has not received the reimbursement after the routine processing time has passed, you should follow-up by checking with the department in charge of expense reimbursements to determine the cause for the delay. If a mistake was made or additional information is needed, you should take care of it as soon as possible.

*SECRETARIAL OCCUPATIONS V-TECS GUIDE.

14.0 **COMPETENCY/SKILL:** Coordinates business meeting arrangements.

14.1 **TASK:** Schedules meetings and/or conferences.

PERFORMANCE OBJECTIVE:

CONDITIONS: Given a case study in which the group size, areas of interest, budget limitations, time frame, geographic location, and basic objectives are stated,

EVALUATION: arranges for locations site, meeting rooms, possible topic, publicity, registration, and conference proceedings.

STANDARD: All items clearly identified, steps listed in appropriate order, budget itemized and within limitations, rooms of appropriate size, correct dates, and geographic location central to group.

STUDENT LEARNING EXPERIENCES:

1. Locate reference materials quoting rates for meeting rooms, lodging, and meal functions.

2. Itemize costs including registration, speakers, publicity audiovisuals, recording of conference proceedings.

3. Select location and meeting rooms.

4. Schedule meeting times, contacts speakers, mails or distributes notices and specifics regarding location of meeting.

5. Send confirmation notices and prepares agenda.

6. Notify participants of any changes in meetings.

7. Arrange for audiovisual or equipment requirements of speaker.

8. Arrange for registration desk and distribution of materials.

SUGGESTED INSTRUCTIONAL TECHNIQUES:

1. Give students a registration form and program for a Spring of Fall Conference of the Arizona Business Education Association or other professional group and have them itemize the steps needed to prepare for the conference.

2. Conduct a mock conference for a class period to be held in another classroom if possible. Let them plan the locations, speaker, registration blank, refreshments (if possible) confrence notes, and topic for the class meeting.

INSTRUCTIONAL EQUIPMENT, MATERIALS, AND SUPPLIES:

1. Registration form, program, hotel registration, and publicity for the Arizona Business Education association, the Vocational Conference, AZVA or other professional conference.

2. See Information Sheet, back of this unit.

RESOURCES:

ARIZONA BUSINESS OCCUPATIONS COMPETENCY-BASED CURRICULUM GUIDE. Arizona Department of Education, Phoenix, AZ. Pages COE 21-24. 1980-81.

Booher, Dianna. THE NEW SECRETARY. Facts on File Publications. 1985.

Fulton, Patsy J., Joanna D. Hanks, J. Sargeant Reynolds. PROCEDURES FOR THE PROFESSIONAL SECRETARY. South-Western Publishing Company, Cincinnati, OH. 1985.

Luke, Cheryl M., and C. B. Stiegler. OFFICE SYSTEMS AND PROCEDURES. Houghton Mifflin Company, Boston, MA. 1986.

Moon, H. R. OFFICE PROCEDURES AND TECHNOLOGY. MPC Educational Publishers, Bronx, NY. Date unavailable.

Rosen, Arnold, Eileen Feretic, Margaret H. Bahniuk. ADMINISTRATIVE PROCEDURES FOR THE ELECTRONIC OFFICE. John Wiley & Sons, Inc., New York, NY. 2ND ED. 1985.

14.0 **COMPETENCY/SKILL:** Coordinates business meeting arrangements.

14.1 **TASK:** Records minutes of meeting accurately and consistently if a recording secretary is not assigned.

PERFORMANCE OBJECTIVE:

CONDITIONS: Given the assignment to take minutes of class meeting, FBLA/PBL, or student council meeting,

EVALUATION: records minutes and prepares printed copy.

STANDARD: Use standard format according to ROBERT'S RULES OF ORDER, with no visible errors.

STUDENT LEARNING EXPERIENCES:

1. Record minutes of class meeting.
2. Use proper format for preparing printed copy.
3. Include all motions and official business.
4. Keyboard and print/store as requested.
5. Distribute minutes of the meeting to interested parties.

SUGGESTED INSTRUCTIONAL TECHNIQUES:

1. Take turns taking minutes of the class sessions to gain knowledge of sorting out important items from incidental items.
2. Hold meetings of student organization according to ROBERT'S RULES OF ORDER and have one-half the class record the minutes reporting to the other half for correction. Select the best set of minutes and put it on a transparency for class analysis.
3. Provide students with official copies of minutes from professional organization, school board meeting, etc. asking them to critique and proofread.

INSTRUCTIONAL EQUIPMENT, MATERIALS, AND SUPPLIES:

1. ROBERT'S RULES OF ORDER.

RESOURCES:

Robert, Henry M., and Sarah C. Robert. ROBERT'S RULES OF ORDER. Scott Foresman and Company, Glenview, IL. 1981.

14.0 **COMPETENCY/SKILL:** Coordinates travel arrangements.

14.3 **TASK:** Handles follow-up meeting activities.

PERFORMANCE OBJECTIVE:

CONDITIONS: Given a list of 3 speakers, conference coordinators name, and addresses for all,

EVALUATION: writes appropriate thank-you letters.

STANDARD: Use standard usage, correct spelling, punctuation, grammar, format, and tone.

STUDENT LEARNING EXPERIENCES:

1. Compose thank-you letters.
2. Address envelopes.
3. Determine persons whose efforts need recognition.
4. Identify persons to whom conference minutes need to be sent.
5. Pay any bills related to the conference.
6. Prepare expense/income statements for the conference.
7. Review evaluations sheets from conference and prepares a conference file to note items which were good and which needed improvement in the conference.
8. Prepare a list of persons to contact for future conferences (guest speakers, other executive, hotel conference coordinators audiovisual suppliers, vendors, contributors, etc.)

SUGGESTED INSTRUCTIONAL TECHNIQUES:

1. Provide students with a copy of a conference attended, ask them to write a thank-you letter to the speakers, the on-site coordinator, or other.

2. Divide the class into groups and have them list things which they have enjoyed at any conference or meeting the attended and things which they did not enjoy. Discuss how things might be improved at a future conference.

3. Review income statements and checkwriting techniques needed for paying for conference expenses.

4. Have the class design an evaluation sheet for a conference using a program from a conference you have attended. Compare it with an actual evaluation form. Discuss differences.

INSTRUCTIONAL EQUIPMENT, MATERIALS, AND SUPPLIES:

RESOURCES:

COORDINATING BUSINESS FUNCTIONS

Much of today's executive working time is devoted to participation in some form of business or social functions, such as interviews, meetings, conferences, conventions, receptions, and dinners. Office workers may be responsible for making the arrangements necessary to ensure a smooth, successful function. Certain preliminary steps should be considered when planning for these functions:

1. consider the purpose of the function;
2. outline your plan of action;
3. finalize arrangements;
4. prepare and/or distribute the necessary communications;
5. perform follow-up activities.

The size and formality of a function will determine where the function will be held and the time it will take to plan and arrange it.

Before planning a function, support staff should meet with their employers to discuss these details:

1. the date and time of the function;
2. the number and names of the individuals who will attend;
3. the location of the function;
4. whether a speaker and/or entertainment is desired;
5. special meeting needs.

Meeting scheduled for an entire day may involve luncheon and dinner arrangements. For meetings spanning more that one day, dining, lodging, and social arrangements (such as entertainment or sightseeing) may have to be planned. Participants must be informed of the details well in advance.

Informal functions, interviews, or small meetings and gatherings can be held in the executive's office. Larger functions such as department head meeting, branch manager or executive committee meetings, and mid-sized receptions or dinners may be held in organizational conference rooms. You must be aware of the procedures necessary to reserve conference rooms; if a conference room is unavailable or inappropriate, check the arrangements provided by local restaurants and hotels. Hotel conference facilities or a convention center can be used for very large functions. Inappropriate surroundings can result in a poor or unproductive gathering, so staff should visit the site beforehand to determine if the room(s) will be suitable to meet function needs.

Arranging receptions, dinners, or meetings in a hotel or restaurant can be relatively simple. You can often rely on the expertise of hotel or restaurant staff--given the necessary data, type of function, and company or the executive's personal preferences--they will be able to serve your needs accordingly. Plans for a large convention should begin well in advance. Cities that host large conventions or meetings normally operate convention bureaus, which are valuable resources. They can provide you with a complete list of area hotels and facilities.

Occasionally, especially for larger functions, speakers will have to be secured. Discuss with your employer appropriate speakers and order of preference. Telephone or write the prospective speaker well in advance so that an answer can be received and arrangements can be made. Arrangements must be made to provide any equipment (projector, easel, chalkboard, etc.) or supplies needed for the presentation, along with any additional personnel.

Materials such as name tags, programs, vendor lists, exhibit hours, meal tickets, organizational literature, maps and tourist attractions, writing paper, etc., should be prepared in advance. You may want to assemble all these items into an attractive folder and distribute the packet to participants during registration. A registration desk or table is often set up to register participants, disseminate programs and/or other materials, and collect fees. Be sure to locate convention signs in strategic areas highly visible to incoming guests.

A final check of facilities and arrangements should be made before the function. Prepare a check list, arrive early, and handle any last minute details.

When planning functions that include meals, consider the following points:

1. Time of day meal is to be served.
2. Does the function fall on a week day or weekend?
3. Expected number of participants.
4. Budget requirements.
5. Organizational policies and practices which affect the function.
6. Room capacity, decor, seating arrangements, ventilation, and lighting.
7. Food and beverage type; should cocktails be provided?
8. Set-up and clean-up.
9. Programs, menus, and entertainment.
10. Special equipment required.

In addition to the function preparations previously discussed, support staff may have to prepare a meeting agenda and minutes report. An AGENDA lists the topics to be discussed, and should be mailed to participants before the meeting for their review. Agenda format will vary, but usually includes a call to order, roll call (oral or visual check), announcements, standing committee reports, old and unfinished business, new business, next meeting date, and adjournment. Knowledge of parliamentary procedure is an asset to an office worker. Rules of PARLIAMENTARY PROCEDURE were set forth for public assemblies or formal meetings in order to maintain order, recognize and protect the rights of each member, and provide a prescribed pattern for conducting meetings. A number of books on parliamentary procedure are available, the most commonly used is ROBERT'S RULES OF ORDER.

MINUTES, or written proceedings of a meeting, are usually recorded in some form by stenographer or tape recorder. The person assigned to take minutes should arrive early to make the necessary preparations. Minutes should be neutral and usually include the following data:

1. Time, date, and place of meeting.
2. Members present and members absent.
3. Presiding officers.
4. Important topics discussed--approvals and disapprovals.
5. Items for future discussion.
6. Adjournment time and signature of recording secretary.

Minutes must be accurate and neat, and format should be standard and in compliance with company policy. Be sure to send a copy of the minutes to all concerned parties.

198

ADMINISTRATIVE ASSISTANT

1.0 **COMPETENCY/SKILL:** Uses written and oral communication skills.

1.1 **TASK:** Writes/prints legibly.

PERFORMANCE OBJECTIVE:

See Recepticnist 1.1.

CONDITIONS:

EVALUATION:

STANDARD:

STUDENT LEARNING EXPERIENCES:

SUGGESTED INSTRUCTIONAL TECHNIQUES:

INSTRUCTIONAL EQUIPMENT, MATERIALS, AND SUPPLIES:

RESOURCES:

1.0 **COMPETENCY/SKILL:** Uses written and oral communication skills.

1.2 **TASK:** Uses concise, specific and grammatically correct language in communications with callers.

PERFORMANCE OBJECTIVE:

See Receptionist 1.2.

CONDITIONS:

EVALUATION:

STANDARD:

STUDENT LEARNING EXPERIENCES:

SUGGESTED INSTRUCTIONAL TECHNIQUES:

INSTRUCTIONAL EQUIPMENT, MATERIALS, AND SUPPLIES:

RESOURCES:

ARIZONA BUSINESS OCCUPATIONS COMPETENCY-BASED CURRICULUM GUIDE. Arizona Department of Education, Phoenix, AZ. 1980-81.

Camp, Sue C. DEVELOPING EDITING SKILL. Gregg/McGraw-Hill Book Company, Novato, CA. 1985.

Mansfield, Carmella E., and Margaret H. Bahniuk. WRITING BUSINESS LETTERS AND REPORTS. Glencoe Publishing Company, Encino, CA. 2ND ED. Date unavailable.

McComas, Donna, and Marilyn Satterwhite. MODERN BUSINESS CORRESPONDENCE. Gregg/McGraw-Hill Book Company, Novato, CA. 5TH ED. 1986.

Murphy, Herta A., and Herbert W. Hildebrandt. EFFECTIVE BUSINESS COMMUNICATIONS. Gregg/McGraw-Hill Book Company, Novato, CA. 4TH ED. 1984.

Reigel, Charles. BASIC LANGUAGE SKILLS. Glencoe Publishing Company, Encino, CA. Date unavailable.

Sheff, Donald A. BUSINESS CORRESPONDENCE. Bobbs-Merrill Educational Publishing, Indianapolis, IN. Date unavailable.

Stewart, Marie M., Kenneth Zimmer, Lyn Clark. BUSINESS ENGLISH AND COMMUNICATION. Gregg/McGraw-Hill Book Company, Novato, CA. 6TH ED. 1984.

1.0 **COMPETENCY/SKILL:** Uses written and oral communication skills.

1.3 **TASK:** Uses information about organization, operations and structure.

PERFORMANCE OBJECTIVE:

See Receptionist 1.3.

CONDITIONS:

EVALUATION:

STANDARD:

STUDENT LEARNING EXPERIENCES:

SUGGESTED INSTRUCTIONAL TECHNIQUES:

INSTRUCTIONAL EQUIPMENT, MATERIALS, AND SUPPLIES:

RESOURCES:

1.0 **COMPETENCY/SKILL:** Uses written and oral communication skills.

1.4 **TASK:** Proofreads and edits to produce mailable business documents.

PERFORMANCE OBJECTIVE:

See Receptionist 1.4.

CONDITIONS:

EVALUATION:

STANDARD:

STUDENT LEARNING EXPERIENCES:

SUGGESTED INSTRUCTIONAL TECHNIQUES:

INSTRUCTIONAL EQUIPMENT, MATERIALS, AND SUPPLIES:

RESOURCES:

Palmer, C. E., and V. A. Pacsy. ACCOUNTING FOR THE MODERN OFFICE. Gregg/McGraw-Hill Book Company, Novato, CA. 1985.

Rosenberg, H. J., C. C. Swinney, S. Van Sickle. PROJECTS IN BUSINESS RECORD KEEPING. South-Western Publishing Company, Cincinnati, OH. 5TH ED. 1985.

1.0 **COMPETENCY/SKILL:** Uses written and oral communication skills.

1.5 **TASK:** Compiles information and composes written communciations to produce mailable business documents.

PERFORMANCE OBJECTIVE:

CONDITIONS: Given the situation where a new information processor is needed,

EVALUATION: gathers data (including prices, features, and functions) and writes a report.

STANDARD: Include all comparative details on three pieces of equipment.

STUDENT LEARNING EXPERIENCES:

1. See Secretary 1.5.
2. Compile information and compose topic sentences, short paragraphs and letters, reports, contracts, speeches, meeting summaries and memoranda.
3. Use the knowledge of the formats of a variety of business documents consistent with company style.
4. Present data in a variety of formats such as charts, tables and graphs.
5. Review a written communication to enhance company image.

SUGGESTED INSTRUCTIONAL TECHNIQUES:

1. Develop checklists to identify the steps needed in order to complete an administrative level task.

2. Expand on the types of documents prepared in class. Examples: Add speeches, graphics for presentations, meeting summaries, contracts, etc.

3. See Secretary 1.5

INSTRUCTIONAL EQUIPMENT, MATERIALS, AND SUPPLIES:

1. See Secretary 1.5.

RESOURCES:

See Secretary 1.5.

1.0 **COMPETENCY/SKILL:** Uses written and oral communication skills.

1.6 **TASK:** Scans written materials to obtain information.

PERFORMANCE OBJECTIVE:

CONDITIONS: Given a series of documents and a list of information items to obtain,

EVALUATION: Scans materials for information,

STANDARD: with 90 percent accuracy.

STUDENT LEARNING EXPERIENCES:

1. Review skimming skills in reading.
2. Read for speed a variety of materials.
3. Read specific assignments for information.
4. Learn to estimate time for skimming/reading.

SUGGESTED INSTRUCTIONAL TECHNIQUES:

1. Encourage students to strive for a SKIMMING rate of about 2,000 words a minute, with a comprehension level of about 80 percent.

2. READING FOR SPEED. A newsweekly is probably the most convenient material to use for self-help in improving speed in reading. Have students choose an article. Read it quickly (skim); time the reading (use a stopwatch if one is available, but absolute exactness isn't essential).

3. Instruct students to follow these steps to read/skim quickly:
   a. Pay close attention to headings, the first paragraph, and the last paragraph.
   b. Look for main ideas. The topic sentence of a paragraph is often the first sentence of the paragraph.
   c. Look for names of people, places, events, and things.
   d. Ask the five "W" questions--who, what, when, why, and where. If something is missed, don't worry about it. Forge ahead.
   e. When finished skimming, note the time it took to skim the article. Write down everything remembered about the article.

4. Estimate the number of words in the article by counting the words in five lines, dividing that total by five, and multiplying that answer by the number of lines in the whole article. After calculating the number of words in the article, divide that figure by the number of minutes it took to read the article.

INSTRUCTIONAL EQUIPMENT, MATERIALS, AND SUPPLIES:

1. Newspapers and magazines, timers.

RESOURCES:

ARIZONA BUSINESS OCCUPATIONS COMPETENCY-BASED CURRICULUM GUIDE. Arizona Department of Education, Phoenix, AZ. Pages CA/R 3-17. 1980-81.

Crawford, T. James, Lawrence W. Erickson, Jerry W. Robinson, Lee R. Beaumont, Arnola C. Ownby. MICROCOMPUTER KEYBOARDING FORMATTING APPLICATION. South-Western Publishing Company, Cincinnati, OH. 1986.

Lloyd, A. L., F. E. Winger, R. P. Poland, R. N. Hanson, A. Rossetti, S. Ober, J. L. Rowe. GREGG COLLEGE TYPING. Gregg/McGraw-Hill Book Company, Novato, CA. Series Five. 1985.

1.0 **COMPETENCY/SKILL:** Uses written and oral communication skills.

1.7 **TASK:** Interprets and analyzes narrative and financial resource materials.

PERFORMANCE OBJECTIVE:

See Secretary 5.5 and 5.6.

CONDITIONS:

EVALUATION:

STANDARD:

STUDENT LEARNING EXPERIENCES:

SUGGESTED INSTRUCTIONAL TECHNIQUES:

INSTRUCTIONAL EQUIPMENT, MATERIALS, AND SUPPLIES:

RESOURCES:

ARIZONA BUSINESS OCCUPATIONS COMPETENCY-BASED CURRICULUM GUIDE. Arizona Department of Education, Phoenix, AZ. 1980-81.

Burtness, Paul S., and Jack E. Hulbert. EFFECTIVE BUSINESS COMMUNICATION. South-Western Publishing Company, Cincinnati, OH. 1985.

Stewart, Marie M., Kenneth Zimmer, Lyn Clark. BUSINESS ENGLISH AND COMMUNICATION. Gregg/McGraw-Hill Book Company, Novato, CA. 6TH ED. 1984.

Williams, John W., and Steven A. Eggland. COMMUNICATION IN ACTION. South-Western Publishing Company, Cincinnati, OH. 1985.

1.0 **COMPETENCY/SKILL:** Uses written and oral communication skills.

1.8 **TASK:** Establishes office procedures.

PERFORMANCE OBJECTIVE:

CONDITIONS: Given a job manual or company policy manual and an activity an office employee would complete,

EVALUATION: develops appropriate procedures and measurements and explain the job,

STANDARD: with an acceptable rating on a checklist.

STUDENT LEARNING EXPERIENCES:

1. Evaluate and review office procedures and updates and implements needed changes.
2. Explain office procedures and outlines job duties.
3. Write objectives with measurable standards.
4. Develop office procedures manual.

SUGGESTED INSTRUCTIONAL TECHNIQUES:

1. Provide students with procedures manual development worksheets. The class might select one or combine several to make one checklist for use.

2. To work in teams to evaluate and compare a collection of company procedures manuals. An acceptable rating on a checklist is the goal.

3. Review good writing techniques from communications sources. The Writing module of the Communications Arts section of the ABOCBCG suggests many introductory and review activities.

4. Have one student outline the steps needed to complete an activity. The other student should follow those steps and measure the correctness and completness of the instructions. (Refer to Listening and Speaking modules of the Communications Arts section of the ABOCBCG.)

5. To work in teams to write individual procedures and organize a collection for a company procedures manual. An acceptable rating on a checklist is the goal.

6. Assign exercises in writing memos to convince management and staff to implement new and changed procedures.

7. In-basket activities to introduce and reinforce these skills should be emphasized.

INSTRUCTIONAL EQUIPMENT, MATERIALS, AND SUPPLIES:

1. Office-style reference manual, typewriters or text editors, sample exercises. Equipment referred to in the assignments such as copier, text editor, calculator, etc.

2. See Information Sheet, MAINTENANCE OF MANUALS, back of Receptionist 5.0.

RESOURCES:

ARIZONA BUSINESS OCCUPATIONS COMPETENCY-BASED CURRICULUM GUIDE. Arizona Department of Education, Phoenix, AZ. Pages CA/W 1-15. 1980-81.

Bittel, Lester R. WHAT EVERY SUPERVISOR SHOULD KNOW: THE BASICS OF SUPERVISORY MANAGEMENT. Gregg/McGraw-Hill Book Company, Novato, CA. 1985.

Boyd, Bradford B. MANAGEMENT-MINDED SUPERVISION. Gregg/McGraw-Hill Book Company, Novato, CA. 3RD ED. 1984.

2.0 **COMPETENCY/SKILL:** Uses personal responsibility skills.

2.1 **TASK:** Conducts oneself in a courteous, businesslike manner at all times.

PERFORMANCE OBJECTIVE:

See Receptionist 2.1.

CONDITIONS:

EVALUATION:

STANDARD:

STUDENT LEARNING EXPERIENCES:

1. See Receptionist 2.1.
2. See Secretary 2.1.
3. Demonstrate patience.

SUGGESTED INSTRUCTIONAL TECHNIQUES:

1. See Secretary 2.1.

2. Work with the following experiences individually or in combination as you complete some of the teaching suggestions.

INSTRUCTIONAL EQUIPMENT, MATERIALS, AND SUPPLIES:

1. See Scretary 2.1.

RESOURCES:

ARIZONA BUSINESS OCCUPATIONS COMPETENCY-BASED CURRICULUM GUIDE. Arizona Department of Education, Phoenix, AZ. Pages HR 1-18; COE 33-49; O/M 17-18; CA/I 1. 1980-81.

ARIZONA BUSINESS OCCUPATIONS COMON-CORE COMPETENCY INSTRUCTION MODULES. Arizona Department of Education, Phoenix, AZ. Chapter--Human Relations/Personal Skills, pages 1-43. 1982.

Bittel, Lester R. WHAT EVERY SUPERVISOR SHOULD KNOW: THE BASICS OF SUPERVISORY MANAGEMENT. Gregg/McGraw-Hill Book Company, Novato, CA. 1985.

Boyd, Bradford B. MANAGEMENT-MINDED SUPERVISION. Gregg/McGraw-Hill Book Company, Novato, CA. 1984.

Quible, Zane K. ADDMINISTRATIVE OFFICE MANAGEMENT: AN INTRODUCTION. Reston Publishing Company, Reston, VA. 3RD ED. 1984.

See Secretary 2.1.

2.0 **COMPETENCY/SKILL:** Uses personal responsibility skills.

2.2 **TASK:** Uses effective time management.

PERFORMANCE OBJECTIVE:

See Receptionist 2.2.

CONDITIONS:

EVALUATION:

STANDARD:

STUDENT LEARNING EXPERIENCES:

SUGGESTED INSTRUCTIONAL TECHNIQUES:

INSTRUCTIONAL EQUIPMENT, MATERIALS, AND SUPPLIES:

RESOURCES:

See Task 2.1.

2.0 **COMPETENCY/SKILL:** Uses personal responsibility skills.

2.3 **TASK:** Maintains familiarity with personnel policies.

PERFORMANCE OBJECTIVE:

See Secretary 2.3.

CONDITIONS:

EVALUATION:

STANDARD:

STUDENT LEARNING EXPERIENCES:

1. See Secretary 2.3.
2. Take a positive, responsible leadership position to bring about organizational efficiency, loyality, and integrity.
3. Demonstrate a positive self-concept.
4. Use inquisitiveness to seek information, develop new procedures, and reach a goal.

SUGGESTED INSTRUCTIONAL TECHNIQUES:

1. See Receptionist 1.3.
2. Include activities which involve students serving as a class or vocational club officer or chairperson.

INSTRUCTIONAL EQUIPMENT, MATERIALS, AND SUPPLIES:

1. See Receptionist 1.3.

RESOURCES:

ARIZONA BUSINESS OCCUPATIONS COMPETENCY-BASED CURRICULUM GUIDE. Arizona Department of Education, Phoenix, AZ. 1980-81.

Quible, Zane K. ADDMINISTRATIVE OFFICE MANAGEMENT: AN INTRODUCTION. Reston Publishing Company, Reston, VA. 3RD ED. 1984.

See Receptionist 1.3.

See Secretary 2.3.

See Task 2.1.

3.0 **COMPETENCY/SKILL:** Operates office machines to complete job tasks.

3.1 **TASK:** Uses electric/electronic typewriter to prepare business documents.

PERFORMANCE OBJECTIVE:

See Receptionist 3.1.

CONDITIONS:

EVALUATION:

STANDARD:

STUDENT LEARNING EXPERIENCES:

SUGGESTED INSTRUCTIONAL TECHNIQUES:

INSTRUCTIONAL EQUIPMENT, MATERIALS, AND SUPPLIES:

RESOURCES:

3.0 **COMPETENCY/SKILL:** Operates office machines to complete job tasks.

3.2 **TASK:** Operates an electronic calculator by touch.

PERFORMANCE OBJECTIVE:

See Receptionist 3.2.

CONDITIONS:

EVALUATION:

STANDARD:

STUDENT LEARNING EXPERIENCES:

SUGGESTED INSTRUCTIONAL TECHNIQUES:

INSTRUCTIONAL EQUIPMENT, MATERIALS, AND SUPPLIES:

RESOURCES:

3.0 **COMPETENCY/SKILL:** Operates office machines to complete job tasks.

3.3 **TASK:** Operates a copier.

PERFORMANCE OBJECTIVE:

See Receptionist 3.3.

CONDITIONS:

EVALUATION:

STANDARD:

STUDENT LEARNING EXPERIENCES:

SUGGESTED INSTRUCTIONAL TECHNIQUES:

INSTRUCTIONAL EQUIPMENT, MATERIALS, AND SUPPLIES:

RESOURCES:

3.0 **COMPETENCY/SKILL:** Operates office machines to complete job tasks.

3.4 **TASK:** Understands the concept of an information system and the elements comprising it.

PERFORMANCE OBJECTIVE:

See Secretary 3.4.

CONDITIONS:

EVALUATION:

STANDARD:

STUDENT LEARNING EXPERIENCES:

SUGGESTED INSTRUCTIONAL TECHNIQUES:

INSTRUCTIONAL EQUIPMENT, MATERIALS, AND SUPPLIES:

RESOURCES:

3.0 **COMPETENCY/SKILL:** Operates office machines to complete job tasks.

3.5 **TASK:** Uses information processor to prepare business documents.

PERFORMANCE OBJECTIVE:

See Secretary 3.5.

CONDITIONS:

EVALUATION:

STANDARD:

STUDENT LEARNING EXPERIENCES:

SUGGESTED INSTRUCTIONAL TECHNIQUES:

INSTRUCTIONAL EQUIPMENT, MATERIALS, AND SUPPLIES:

RESOURCES:

3.0 **COMPETENCY/SKILL:** Operates office machines to complete job tasks.

3.6 **TASK:** Manipulates files using keyboard commands to merge stored information.

PERFORMANCE OBJECTIVE:

See Secretary 3.6.

CONDITIONS:

EVALUATION:

STANDARD:

STUDENT LEARNING EXPERIENCES:

SUGGESTED INSTRUCTIONAL TECHNIQUES:

INSTRUCTIONAL EQUIPMENT, MATERIALS, AND SUPPLIES:

RESOURCES:

3.0 **COMPETENCY/SKILL:** Operates office machines to complete job tasks.

3.7 **TASK:** Maintains records and files using knowledge of records management to store, retrieve, and purge information.

PERFORMANCE OBJECTIVE:

See Secretary 3.7.

CONDITIONS:

EVALUATION:

STANDARD:

STUDENT LEARNING EXPERIENCES:

SUGGESTED INSTRUCTIONAL TECHNIQUES:

INSTRUCTIONAL EQUIPMENT, MATERIALS, AND SUPPLIES:

RESOURCES:

3.0 **COMPETENCY/SKILL:** Operates office machines to complete job tasks.

3.8 **TASK:** Applies efficient dictation/transcription procedures.

PERFORMANCE OBJECTIVE:

See Secretary 3.8.

CONDITIONS:

EVALUATION:

STANDARD:

STUDENT LEARNING EXPERIENCES:

SUGGESTED INSTRUCTIONAL TECHNIQUES:

INSTRUCTIONAL EQUIPMENT, MATERIALS, AND SUPPLIES:

RESOURCES:

3.0 **COMPETENCY/SKILL:** Operates office machines to complete job tasks.

3.9 **TASK:** Corrects minor office machine malfunctions and if malfunction cannot be corrected by the operator, reports it to a service firm.

PERFORMANCE OBJECTIVE:

See Secretary 3.9.

CONDITIONS:

EVALUATION:

STANDARD:

STUDENT LEARNING EXPERIENCES:

SUGGESTED INSTRUCTIONAL TECHNIQUES:

INSTRUCTIONAL EQUIPMENT, MATERIALS, AND SUPPLIES:

RESOURCES:

3.0 **COMPETENCY/SKILL:** Operates office machines to complete job tasks.

3.10 **TASK:** Recommends new technology for performing information processing tasks and facilitates changes.

PERFORMANCE OBJECTIVE:

CONDITIONS: Given a case study, or a real business situation,

EVALUATION: Conducts a feasibility study and writes a recommendation report.

STANDARD: Include equipment lists, flow charts, procedures, staff training and development, budget, and timelines, meeting business or instructor standards.

STUDENT LEARNING EXPERIENCES:

1. Collect data using either the document analysis, activity survey, or opinion survey methods.

2. Organize the data in pie charts or graphs.

3. Analyze and sort data and include in the report WHY the study was undertaken, HOW it was conducted and WHAT the data revealed.

4. Select appropriate equipment for recommendation. Future needs must be kept in mind. Select equipment that is upgradeable, compatible with existing equipment if possible, allows for expansion and networking.

5. Consider the physical and psychological environment.

6. Prepare the budget giving some alternatives.

7. Implement the changes arranging for staff development and training on the new system in one department, several departments, or in the total orgznization.

SUGGESTED INSTRUCTIONAL TECHNIQUES:

1. After giving students case studies regarding feasibility studies, have them conduct a study for the school, later they could do one for a local business..

INSTRUCTIONAL EQUIPMENT, MATERIALS, AND SUPPLIES:

1. Reference materials, case studies, equipment and supply catalogs.

RESOURCES:

Hampton, D. R. MANAGEMENT. Gregg/McGraw-Hill Book Company, Novato, CA. 3RD ED. 1986.

Keeling, B. L., and N. F. Kallaus. ADMINISTRATIVE OFFICE MANAGEMENT. South-Western Publishing Company, Cincinnati, OH. Abridged, 8TH ED. 1984.

Quible, Zane K. ADDMINISTRATIVE OFFICE MANAGEMENT: AN INTRODUCTION. Reston Publishing Company, Reston, VA. 3RD ED. 1984.

Steade, R., J. Lowry, R. Glos. BUSINESS: ITS NATURE AND ENVIRONMENT--AN INTRODUCTION. South-Western Publishing Company, Cincinnati, OH. 10TH ED. 1984.

Waggoner, Kathleen P., and Mary M. Ruprecht. OFFICE AUTOMATION: A MANAGEMENT APPROACH. John Wiley & Sons, Inc., New York, NY. 1984.

4.0 **COMPETENCY/SKILL:** Applies principles of records filing and management.

4.1 **TASK:** Indexes, codes, and files documents for alphabetic, numeric, subject, chronological, and geographical filing.

PERFORMANCE OBJECTIVE:

See Receptionist 4.1.

CONDITIONS:

EVALUATION:

STANDARD:

STUDENT LEARNING EXPERIENCES:

SUGGESTED INSTRUCTIONAL TECHNIQUES:

INSTRUCTIONAL EQUIPMENT, MATERIALS, AND SUPPLIES:

RESOURCES:

4.0 **COMPETENCY/SKILL:** Applies principles of records filing and management.

4.2 **TASK:** Maintains filing system.

PERFORMANCE OBJECTIVE:

See Receptionist 4.2.

CONDITIONS:

EVALUATION:

STANDARD:

STUDENT LEARNING EXPERIENCES:

SUGGESTED INSTRUCTIONAL TECHNIQUES:

INSTRUCTIONAL EQUIPMENT, MATERIALS, AND SUPPLIES:

RESOURCES:

4.0 **COMPETENCY/SKILL:** Applies principles of records filing and management.

4.3 **TASK:** Determines records filing needs, recommends, and establishes a filing system.

PERFORMANCE OBJECTIVE:

See Secretary 4.3.

CONDITIONS:

EVALUATION:

STANDARD:

STUDENT LEARNING EXPERIENCES:

SUGGESTED INSTRUCTIONAL TECHNIQUES:

INSTRUCTIONAL EQUIPMENT, MATERIALS, AND SUPPLIES:

RESOURCES:

4.0 **COMPETENCY/SKILL:** Applies principles of records filing and management.

4.4 **TASK:** Revises a filing system.

PERFORMANCE OBJECTIVE:

See Secretary 4.4.

CONDITIONS:

EVALUATION:

STANDARD:

STUDENT LEARNING EXPERIENCES:

SUGGESTED INSTRUCTIONAL TECHNIQUES:

INSTRUCTIONAL EQUIPMENT, MATERIALS, AND SUPPLIES:

RESOURCES:

5.0 **COMPETENCY/SKILL:** Uses reference materials.

5.1 **TASK:** Uses telephone directories.

PERFORMANCE OBJECTIVE:

See Receptionist 5.1.

CONDITIONS:

EVALUATION:

STANDARD:

STUDENT LEARNING EXPERIENCES:

SUGGESTED INSTRUCTIONAL TECHNIQUES:

INSTRUCTIONAL EQUIPMENT, MATERIALS, AND SUPPLIES:

RESOURCES:

5.0 **COMPETENCY/SKILL:** Uses reference materials.

5.2 **TASK:** Uses and maintains company directory, city directory, and a zip code directory.

PERFORMANCE OBJECTIVE:

See Receptionist 5.2.

CONDITIONS:

EVALUATION:

STANDARD:

STUDENT LEARNING EXPERIENCES:

SUGGESTED INSTRUCTIONAL TECHNIQUES:

INSTRUCTIONAL EQUIPMENT, MATERIALS, AND SUPPLIES:

RESOURCES:

5.0 **COMPETENCY/SKILL:** Uses reference materials.

5.3 **TASK:** Uses dictionary, atlas, maps, and timetables.

PERFORMANCE OBJECTIVE:

See Receptionist 5.3.

CONDITIONS:

EVALUATION:

STANDARD:

STUDENT LEARNING EXPERIENCES:

SUGGESTED INSTRUCTIONAL TECHNIQUES:

INSTRUCTIONAL EQUIPMENT, MATERIALS, AND SUPPLIES:

RESOURCES:

5.0 **COMPETENCY/SKILL:** Uses reference materials.

5.4 **TASK:** Keeps numbers and addresses necessary for emergencies in a convenient place for quick reference.

PERFORMANCE OBJECTIVE:

See Receptionist 5.4.

CONDITIONS:

EVALUATION:

STANDARD:

STUDENT LEARNING EXPERIENCES:

SUGGESTED INSTRUCTIONAL TECHNIQUES:

INSTRUCTIONAL EQUIPMENT, MATERIALS, AND SUPPLIES:

RESOURCES:

5.0 **COMPETENCY/SKILL:** Uses reference materials.

5.5 **TASK:** Collects related materials from several reference sources, organizes, and anaylzes information to prepare reports, contracts, and budgets.

PERFORMANCE OBJECTIVE:

See Adminstrative Assistant 3.10 (feasibility study).

CONDITIONS:

EVALUATION:

STANDARD:

STUDENT LEARNING EXPERIENCES:

SUGGESTED INSTRUCTIONAL TECHNIQUES:

INSTRUCTIONAL EQUIPMENT, MATERIALS, AND SUPPLIES:

RESOURCES:

Mansfield, Carmella E., and Margaret H. Bahniuk. WRITING BUSINESS LETTERS AND REPORTS. Glencoe Publishing Company, Encino, CA. 2ND ED. Date unavailable.

McComas, Donna, and Marilyn Satterwhite. MODERN BUSINESS CORRESPONDENCE. Gregg/McGraw-Hill Book Company, Novato, CA. 5TH ED. 1986.

Palmer, C. E., and V. A. Pacey. ACCOUNTING FOR THE MODERN OFFICE. Gregg/McGraw-Hill Book Company, Novato, CA. 1985.

USING REFERENCE SOURCES. National Instructional Systems, Inc., Huntington Beach, CA. Date unavailable.

6.0 **COMPETENCY/SKILL:** Organizes work area.

6.1 **TASK:** Keeps desk neat and arranges for coverage of desk at all times.

PERFORMANCE OBJECTIVE:

See Receptionist 6.2.

CONDITIONS:

EVALUATION:

STANDARD:

STUDENT LEARNING EXPERIENCES:

SUGGESTED INSTRUCTIONAL TECHNIQUES:

INSTRUCTIONAL EQUIPMENT, MATERIALS, AND SUPPLIES:

RESOURCES:

7.0 **COMPETENCY/SKILL:** Schedules appointments following company procedures.

7.1 **TASK:** Makes appointments requested by executive.

PERFORMANCE OBJECTIVE:

See Receptionist 7.1.

CONDITIONS:

EVALUATION:

STANDARD:

STUDENT LEARNING EXPERIENCES:

SUGGESTED INSTRUCTIONAL TECHNIQUES:

INSTRUCTIONAL EQUIPMENT, MATERIALS, AND SUPPLIES:

RESOURCES:

7.0 **COMPETENCY/SKILL:** Schedules appointments following company procedures.

7.2 **TASK:** Makes appointments for others to see executive.

PERFORMANCE OBJECTIVE:

See Receptionist 7.2.

CONDITIONS:

EVALUATION:

STANDARD:

STUDENT LEARNING EXPERIENCES:

SUGGESTED INSTRUCTIONAL TECHNIQUES:

INSTRUCTIONAL EQUIPMENT, MATERIALS, AND SUPPLIES:

RESOURCES:

7.0 **COMPETENCY/SKILL:** Schedules appointments following company procedures.

7.3 **TASK:** Reschedules future appointments.

PERFORMANCE OBJECTIVE:

See Receptionist 7.3.

CONDITIONS:

EVALUATION:

STANDARD:

STUDENT LEARNING EXPERIENCES:

SUGGESTED INSTRUCTIONAL TECHNIQUES:

INSTRUCTIONAL EQUIPMENT, MATERIALS, AND SUPPLIES:

RESOURCES:

8.0 **COMPETENCY/SKILL:** Receives and places telephone calls.

8.1 **TASK:** Describes telephone services available and how they are used.

PERFORMANCE OBJECTIVE:

See Receptionist 8.1.

CONDITIONS:

EVALUATION:

STANDARD:

STUDENT LEARNING EXPERIENCES:

SUGGESTED INSTRUCTIONAL TECHNIQUES:

INSTRUCTIONAL EQUIPMENT, MATERIALS, AND SUPPLIES:

RESOURCES:

8.0 **COMPETENCY/SKILL:** Receives and places telephone calls.

8.2 **TASK:** Places outgoing calls.

PERFORMANCE OBJECTIVE:

See Receptionist 8.2.

CONDITIONS:

EVALUATION:

STANDARD:

STUDENT LEARNING EXPERIENCES:

SUGGESTED INSTRUCTIONAL TECHNIQUES:

INSTRUCTIONAL EQUIPMENT, MATERIALS, AND SUPPLIES:

RESOURCES:

8.0 **COMPETENCY/SKILL:** Receives and places telephone calls.

8.3 **TASK:** Answers telephone.

PERFORMANCE OBJECTIVE:

See Receptionist 8.3.

CONDITIONS:

EVALUATION:

STANDARD:

STUDENT LEARNING EXPERIENCES:

SUGGESTED INSTRUCTIONAL TECHNIQUES:

INSTRUCTIONAL EQUIPMENT, MATERIALS, AND SUPPLIES:

RESOURCES:

8.0 **COMPETENCY/SKILL:** Receives and places telephone calls.

8.4 **TASK:** Transfers Calls.

PERFORMANCE OBJECTIVE:

See Receptionist 8.4.

CONDITIONS:

EVALUATION:

STANDARD:

STUDENT LEARNING EXPERIENCES:

SUGGESTED INSTRUCTIONAL TECHNIQUES:

INSTRUCTIONAL EQUIPMENT, MATERIALS, AND SUPPLIES:

RESOURCES:

8.0 **COMPETENCY/SKILL:** Receives and places telephone calls.

8.5 **TASK:** Takes messages.

PERFORMANCE OBJECTIVE:

See Receptionist 8.5.

CONDITIONS:

EVALUATION:

STANDARD:

STUDENT LEARNING EXPERIENCES:

SUGGESTED INSTRUCTIONAL TECHNIQUES:

INSTRUCTIONAL EQUIPMENT, MATERIALS, AND SUPPLIES:

RESOURCES:

8.0 **COMPETENCY/SKILL:** Receives and places telephone calls.

8.6 **TASK:** Receives telephone calls for visitors during meeting.

PERFORMANCE OBJECTIVE:

See Receptionist 8.6, and Secretary 8.6.

CONDITIONS:

EVALUATION:

STANDARD:

STUDENT LEARNING EXPERIENCES:

SUGGESTED INSTRUCTIONAL TECHNIQUES:

INSTRUCTIONAL EQUIPMENT, MATERIALS, AND SUPPLIES:

RESOURCES:

9.0 **COMPETENCY/SKILL:** Receives visitors to the office.

9.1 **TASK:** Greets visitors and determines purpose of the visit.

PERFORMANCE OBJECTIVE:

See Receptionist 9.1.

CONDITIONS:

EVALUATION:

STANDARD:

STUDENT LEARNING EXPERIENCES:

SUGGESTED INSTRUCTIONAL TECHNIQUES:

INSTRUCTIONAL EQUIPMENT, MATERIALS, AND SUPPLIES:

RESOURCES:

9.0 **COMPETENCY/SKILL:** Receives visitors to the office.

9.2 **TASK:** Applies company policies and executive preference regarding an unscheduled visitor.

PERFORMANCE OBJECTIVE:

See Receptionist 9.2.

CONDITIONS:

EVALUATION:

STANDARD:

STUDENT LEARNING EXPERIENCES:

SUGGESTED INSTRUCTIONAL TECHNIQUES:

INSTRUCTIONAL EQUIPMENT, MATERIALS, AND SUPPLIES:

RESOURCES:

9.0 **COMPETENCY/SKILL:** Receives visitors to the office.

9.3 **TASK:** Applies company policies and executive preference regarding a scheduled visitor.

PERFORMANCE OBJECTIVE:

See Receptionist 9.3.

CONDITIONS:

EVALUATION:

STANDARD:

STUDENT LEARNING EXPERIENCES:

SUGGESTED INSTRUCTIONAL TECHNIQUES:

INSTRUCTIONAL EQUIPMENT, MATERIALS, AND SUPPLIES:

RESOURCES:

9.0 **COMPETENCY/SKILL:** Receives visitors to the office.

9.4 **TASK:** Manages visitors who are waiting in the reception room.

PERFORMANCE OBJECTIVE:

See Receptionist 9.4.

CONDITIONS:

EVALUATION:

STANDARD:

STUDENT LEARNING EXPERIENCES:

SUGGESTED INSTRUCTIONAL TECHNIQUES:

INSTRUCTIONAL EQUIPMENT, MATERIALS, AND SUPPLIES:

RESOURCES:

10.0 **COMPETENCY/SKILL:** Processes mail following company procedures.

10.1 **TASK:** Processes incoming mail based on the employer's needs.

PERFORMANCE OBJECTIVE:

See Receptionist 10.1.

CONDITIONS:

EVALUATION:

STANDARD:

STUDENT LEARNING EXPERIENCES:

SUGGESTED INSTRUCTIONAL TECHNIQUES:

INSTRUCTIONAL EQUIPMENT, MATERIALS, AND SUPPLIES:

RESOURCES:

10.0 **COMPETENCY/SKILL:** Processes mail following company procedures.

10.2 **TASK:** Processes outgoing mail based on the employer's needs.

PERFORMANCE OBJECTIVE:

See Receptionist 10.2.

CONDITIONS:

EVALUATION:

STANDARD:

STUDENT LEARNING EXPERIENCES:

SUGGESTED INSTRUCTIONAL TECHNIQUES:

INSTRUCTIONAL EQUIPMENT, MATERIALS, AND SUPPLIES:

RESOURCES:

10.0 **COMPETENCY/SKILL:** Processes mail following company procedures.

10.3 **TASK:** Prepares parcels and packages carefully so that the contents will be delivered quickly and in good condition.

PERFORMANCE OBJECTIVE:

See Secretary 10.3.

CONDITIONS:

EVALUATION:

STANDARD:

STUDENT LEARNING EXPERIENCES:

SUGGESTED INSTRUCTIONAL TECHNIQUES:

INSTRUCTIONAL EQUIPMENT, MATERIALS, AND SUPPLIES:

RESOURCES:

10.0 **COMPETENCY/SKILL:** Processes mail following company procedures.

10.4 **TASK:** Files return receipts, insurance, and registered mail receipts.

PERFORMANCE OBJECTIVE:

See Secretary 10.4.

CONDITIONS:

EVALUATION:

STANDARD:

STUDENT LEARNING EXPERIENCES:

SUGGESTED INSTRUCTIONAL TECHNIQUES:

INSTRUCTIONAL EQUIPMENT, MATERIALS, AND SUPPLIES:

RESOURCES:

10.0 **COMPETENCY/SKILL:** Processes mail following company procedures.

10.5 **TASK:** Transmits mail electronically.

PERFORMANCE OBJECTIVE:

See Secretary 10.5.

CONDITIONS:

EVALUATION:

STANDARD:

STUDENT LEARNING EXPERIENCES:

SUGGESTED INSTRUCTIONAL TECHNIQUES:

INSTRUCTIONAL EQUIPMENT, MATERIALS, AND SUPPLIES:

RESOURCES:

11.0 **COMPETENCY/SKILL:** Applies principles of financial recordkeeping.

11.1 **TASK:** Maintains petty cash fund.

PERFORMANCE OBJECTIVE:

See Secretary 11.1.

CONDITIONS:

EVALUATION:

STANDARD:

STUDENT LEARNING EXPERIENCES:

SUGGESTED INSTRUCTIONAL TECHNIQUES:

INSTRUCTIONAL EQUIPMENT, MATERIALS, AND SUPPLIES:

RESOURCES:

11.0 **COMPETENCY/SKILL:** Applies principles of financial recordkeeping.

11.2 **TASK:** Maintains a checkbook.

PERFORMANCE OBJECTIVE:

See Secretary 11.2.

CONDITIONS:

EVALUATION:

STANDARD:

STUDENT LEARNING EXPERIENCES:

SUGGESTED INSTRUCTIONAL TECHNIQUES:

INSTRUCTIONAL EQUIPMENT, MATERIALS, AND SUPPLIES:

RESOURCES:

11.0 **COMPETENCY/SKILL:** Applies principles of financial recordkeeping.

11.3 **TASK:** Prepares Payroll.

PERFORMANCE OBJECTIVE:

See Secretary 11.3.

CONDITIONS:

EVALUATION:

STANDARD:

STUDENT LEARNING EXPERIENCES:

SUGGESTED INSTRUCTIONAL TECHNIQUES:

INSTRUCTIONAL EQUIPMENT, MATERIALS, AND SUPPLIES:

RESOURCES:

12.0 **COMPETENCY/SKILL:** Maintains office supplies.

12.1 **TASK:** Orders and receives office supplies.

PERFORMANCE OBJECTIVE:

See Secretary 12.1.

CONDITIONS:

EVALUATION:

STANDARD:

STUDENT LEARNING EXPERIENCES:

SUGGESTED INSTRUCTIONAL TECHNIQUES:

INSTRUCTIONAL EQUIPMENT, MATERIALS, AND SUPPLIES:

RESOURCES:

12.0 **COMPETENCY/SKILL:** Maintains office supplies.

12.2 **TASK:** Maintains office inventory of supplies.

PERFORMANCE OBJECTIVE:

See Secretary 12.2.

CONDITIONS:

EVALUATION:

STANDARD:

STUDENT LEARNING EXPERIENCES:

SUGGESTED INSTRUCTIONAL TECHNIQUES:

INSTRUCTIONAL EQUIPMENT, MATERIALS, AND SUPPLIES:

RESOURCES:

13.0 **COMPETENCY/SKILL:** Coordinates travel Arrangements.

13.1 **TASK:** Uses knowledge of time zones, passports, visas and inoculations in arranging travel (domestic and foreign).

PERFORMANCE OBJECTIVE:

See Secretary 13.1.

CONDITIONS:

EVALUATION:

STANDARD:

STUDENT LEARNING EXPERIENCES:

SUGGESTED INSTRUCTIONAL TECHNIQUES:

INSTRUCTIONAL EQUIPMENT, MATERIALS, AND SUPPLIES:

RESOURCES:

13.0 **COMPETENCY/SKILL:** Coordinates travel arrangements.

13.2 **TASK:** Organizes and packs materials relating to business activities that are necessary to make the trip successful.

PERFORMANCE OBJECTIVE:

See Secretary 13.2.

CONDITIONS:

EVALUATION:

STANDARD:

STUDENT LEARNING EXPERIENCES:

SUGGESTED INSTRUCTIONAL TECHNIQUES:

INSTRUCTIONAL EQUIPMENT, MATERIALS, AND SUPPLIES:

RESOURCES:

13.0 **COMPETENCY/SKILL:** Coordinates travel arrangements.

13.3 **TASK:** Coordinates the tasks necessary to maintain a smooth and continuous work flow in the executive's absence.

PERFORMANCE OBJECTIVE:

See Secretary 13.4.

CONDITIONS:

EVALUATION:

STANDARD:

STUDENT LEARNING EXPERIENCES:

SUGGESTED INSTRUCTIONAL TECHNIQUES:

INSTRUCTIONAL EQUIPMENT, MATERIALS, AND SUPPLIES:

RESOURCES:

13.0 **COMPETENCY/SKILL:** Coordinates travel arrangements.

13.4 **TASK:** Performs follow-up activities resulting from the trip.

PERFORMANCE OBJECTIVE:

See Secretary 13.4.

CONDITIONS:

EVALUATION:

STANDARD:

STUDENT LEARNING EXPERIENCES:

SUGGESTED INSTRUCTIONAL TECHNIQUES:

INSTRUCTIONAL EQUIPMENT, MATERIALS, AND SUPPLIES:

RESOURCES:

14.0 **COMPETENCY/SKILL:** Coordinates business meeting arrangements.

14.1 **TASK:** Schedules meetings/conferences.

PERFORMANCE OBJECTIVE:

See Secretary 14.1.

CONDITIONS:

EVALUATION:

STANDARD:

STUDENT LEARNING EXPERIENCES:

SUGGESTED INSTRUCTIONAL TECHNIQUES:

INSTRUCTIONAL EQUIPMENT, MATERIALS, AND SUPPLIES:

RESOURCES:

14.0 **COMPETENCY/SKILL:** Coordinates business meeting arrangements.

14.2 **TASK:** Arranges for recording minutes of the meeting.

PERFORMANCE OBJECTIVE:

See Secretary 14.2.

CONDITIONS:

EVALUATION:

STANDARD:

STUDENT LEARNING EXPERIENCES:

SUGGESTED INSTRUCTIONAL TECHNIQUES:

INSTRUCTIONAL EQUIPMENT, MATERIALS, AND SUPPLIES:

RESOURCES:

14.0 **COMPETENCY/SKILL:** Coordinates business meeting arrangements.

14.3 **TASK:** Handles follow-up meeting activities.

PERFORMANCE OBJECTIVE:

See Secretary 14.3.

CONDITIONS:

EVALUATION:

STANDARD:

STUDENT LEARNING EXPERIENCES:

SUGGESTED INSTRUCTIONAL TECHNIQUES:

INSTRUCTIONAL EQUIPMENT, MATERIALS, AND SUPPLIES:

RESOURCES:

14.0 **COMPETENCY/SKILL:** Coordinates business meeting arrangements.

14.4 **TASK:** Assists employer in developing materials for presentations.

PERFORMANCE OBJECTIVE:

CONDITIONS: Given a topic related to a business area,

EVALUATION: gathers quotes, general information, and prepares visual aids (posters, transparencies, slides, videotapes),

STANDARD: with all information relating to the topic, and all visual aids legible, correct and meaningful.

STUDENT LEARNING EXPERIENCES:

1. Read current periodicals.
2. Use library to find quotes, quips, humorous analogies, etc. to relate to a given topic.
3. Select pertinent information from a large body of informations.
4. Use data bases to access current research.
5. Use resources available to make visual aids or have them made.

SUGGESTED INSTRUCTIONAL TECHNIQUES:

1. Select 5 to 6 topics relating to business, let students draw topics, forming groups with those having the same topics to the class and give them library time to do the research.
2. Invite the school audiovisual specialist in to discuss various types of aids available to enhance a presentation.

INSTRUCTIONAL EQUIPMENT, MATERIALS, AND SUPPLIES:

1. Library access, audiovisual aids.

RESOURCES:

See Secretary 14.1, 14.2, and 14.3.

14.0 **COMPETENCY/SKILL:** Coordinates business meeting arrangements.

14.5 **TASK:** Recommends alternative methods of holding meetings.

PERFORMANCE OBJECTIVE:

CONDITIONS: Given a list of alternative methods of holding meetings,

EVALUATION: defines each and lists advantages and disadvantages,

STANDARD: with 80 percent accuracy.

STUDENT LEARNING EXPERIENCES:

1. Read current periodicals describing alternatives including:
   a. teleconferencing;
   b. videoconferencing;
   c. computer conferencing;
   d. electronic blackboards.

2. Determine effectiveness of each type of conferencing.

3. Understand the human element involved in each method.

4. Research costs involved with different types of conferencing.

SUGGESTED INSTRUCTIONAL TECHNIQUES:

1. Visit the local educational institution of business which utilizes alternate methods of conferencing, or secure videotape of the process.

INSTRUCTIONAL EQUIPMENT, MATERIALS, AND SUPPLIES:

1. Videotapes or other aids to present alternate methods of holding meetings.

RESOURCES:

See Secretary 14.1, 14.2, and 14.3.

15.0 **COMPETENCY/SKILL:** Supervises personnel.

15.1 **TASK:** Makes assignments.

PERFORMANCE OBJECTIVE:

CONDITIONS: Given a role play situation where incoming work needs to be completed,

EVALUATION: assigns the work to an employee.

STANDARD: Ensure that the subordinate knows: WHAT to do, HOW to do it, WHEN to do it, WHY to do it.

STUDENT LEARNING EXPERIENCES:

1. Define and describe motivations.
2. Identify several motivation theories.
3. Express pay as a motivator.
4. Describe possible rewards the supervisor can dispense.
5. Describe how job rotation, enlargement, and enrichment can be used to make dull jobs more interesting.
6. Explain how quality circles can be used as motivators.
7. Explain the concept of directing as it relates to the supervisor.
8. Is aware of the importance of equity.
9. Assign and schedules employees' activities.

SUGGESTED INSTRUCTIONAL TECHNIQUES:

1. Discuss some motivational theories such as:
   a. Maslov's Hierarchy of Needs;
   b. Herzberg's Motivation/Hygiene Theory;
   c. Broom's Expectancy Theory;
   d. Skinner's Reinforcement Theory.

2. Role play in class with students making assignments for tasks to be completed.

3. Discuss methods of delegating and assigning.

4. Use peer evaluation to evaluate supervisory techniques.

INSTRUCTIONAL EQUIPMENT, MATERIALS, AND SUPPLIES:

1. See Information Sheets, back of this unit.

RESOURCES:

Bittel, Lester R. WHAT EVERY SUPERVISOR SHOULD KNOW: THE BASICS OF SUPERVISORY MANAGEMENT. Gregg/McGraw-Hill Book Company, Novato, CA. 1985.

Booher, Dianna. THE NEW SECRETARY. Facts on File Publications. 1985.

Boyd, Bradford B. MANAGEMENT-MINDED SUPERVISON. Gregg/McGraw-Hill Book Company, Novato, CA. 3RD ED. 1984.

Daggett, W. R. THE DYNAMICS OF WORK. South-Western Publishing Company, Cincinnati, OH. 1984.

Hampton, D. R. MANAGEMENT. Gregg/McGraw-Hill Book Company, Novato, CA. 3RD ED. 1986.

Keeling, B. K., and N. F. Kallaus. ADMINISTRATIVE OFFICE MANAGEMENT. South-Western Publishing Company, Cincinnati, OH. Abridged, 8TH ED. 1984.

Steade, R., J. Lowry, R. Glos. BUSINESS: ITS NATURE AND ENVIRONMENT--AN INTRODUCTION. South-Western Publishing Company, Cincinnati, OH. 10TH ED. 1984.

15.0 **COMPETENCY/SKILL:** Supervises personnel.

15.2 **TASK:** Familiarizes new employees with business.

PERFORMANCE OBJECTIVE:

CONDITIONS: Given an organizational chart, an office manual, and a job description for a new employee,

EVALUATION: lists important items to be discussed with the new employee.

STANDARD: Include duties, expectations, organizational chart, introductions of peers, supervisor's superior, subordinates (if any) rules and regulations, salary (unless handled by personnel office).

STUDENT LEARNING EXPERIENCES:

1. Read and understand organization chart.
2. Read and understand office procedures manual.
3. Know chain of command and persons who need to meet the new employee.
4. Explain to new employee where to go for specific information.
5. Understand history of company and its attitude toward employees.

SUGGESTED INSTRUCTIONAL TECHNIQUES:

1. See Administrative Assistant 1.8 for related written exercise.

INSTRUCTIONAL EQUIPMENT, MATERIALS, AND SUPPLIES:

1. Organizational chart for local company or other company.
2. Office procedures manual.
3. Job description for entry level employee.

RESOURCES:

See Task 15.1.

SCHEDULING WORK ASSIGNMENTS

One of the most important tasks you will perform in a supervisory capacity is the scheduling of work assignments among employees. The delegation of responsibility and authority for work by a supervisor to his/her assistants is generally regarded by management authorities as one of the most important requirements for executive success. The term DELEGATION, as used in management, means to assign certain responsibilities to another person along with the authority to make certain decisions in order to carry out those responsibilities. In your first supervisory position you may not be delegating authority for desicion-making, but you will have to delegate work assignments.

When responsibilities are assigned to individual employees, each employee assumes an obligation to perform certain duties. In order for all necessary work to be performed, it is highly desirable that work assignments be clear-cut and well-explained to employees. Special tools used to define responsibility for the different types of work include: organizational charts, organizational manual, charts of work distribution within departments, and job descriptions. These tools must be supplemented by adequate training and personal consultation with each employee to ensure the understanding of the nature and scope of his/her responsibilities.

The process of assigning responsibility and authority starts at the top of the organization, and the ideal arrangement is one providing a definite chain of responsibility and authority from the top executive to each employee. It is desireable for each employee to take direct orders from only one supervisor, although some of his/her actions may be influenced strongly by staff specialist. Delegating responsibility, however, does not relieve the supervisor of the final responsibility and obligation--the supervisor retains final responsibility for accomplishing a job, even though she/he may have "sub-contracted" all or parts of the job to assistants.

Formal authority is certainly not the only management tool for getting work done; the best results come from keeping authority in the background and using interesting work assignments, two-way communication, effective use of employee participation in decision-making, and other means of motivation to inspire employee cooperation in getting the job done.

A supervisor can pave the way for an employee to experience a feeling of accomplishment by dividing work into batches and giving the employee one batch at a time, such as an assignment that can be finished in two hours. Nobody likes to face an endless task, so setting these subgoals for the employees you supervise will be an important part of your work. Check the finished work at the time it is submitted to you to assure the employee that it is satisfactory and to spot any errors that must be corrected.

Give a new employee some repetitive tasks so that she/he can work successfully for a period of time without asking for help. However, you must rotate the work in order to provide enough variety to keep the employee from becoming bored or experiencing unnecessary fatigue. Put the employee on his/her own as soon as possible. Check frequently, but do not oversupervise. Let the employee know you are willing to answer questions or offer assistance whenever it is needed.

Workers experience the greatest job satisfaction from performing a complete job. Whenever possible, look for ways to change an employee's assignment from performing one segment of a job to that of beginning a job and seeing it through to completion. When you must distribute work to several employees, begin by becoming familiar with their job descriptions. If possible, give each employee a special assignment that others are not performing in order to cut down on friction between the fast and slow workers and enable you to utilize the talents of each employee. Do not overload one employee because she/he has the most skill or let another employee remain idle because she/he is a slow typist or cannot transcribe. Relieve the skilled worker of routine tasks that the unskilled worker could perform, and give the skilled worker more challenging work and more responsibility.

There are several factors to be considered when delegating work assignments. You must consider priority tasks, due dates for tasks, workloads and abilities of employees, and loss of available employees due to vacation, sick leave, etc. Careful planning and organizing is necessary for the effective delegation of work. You must select a job to be delegated and then carefully choose the person who will be in charge of the work, organize the work, instruct the delegate, and turn the work over to him/her for completion. Spend time with the delegate until she/he understand what the job entails and exactly how to perform it. Encourage the employee to perform the job without relying on you. Refrain from constantly checking on the job, but let the employee keep you informed on its progress.

In summary, an effective approach to delegation involves these considerations:

1. Systematic appraisal of all duties performed in the department with a view of assigning them at the lovest job level capable of handling them effectively.
2. Careful choice of the person who is delegated each specific duty.
3. Clear explanation to the employee involved concerning what is expected--a clear definition of responsibility and authority.
4. Adequate training in the assigned work, including thorough knowledge of policies and procedures to be followed and development of specific skills needed.
5. Delegation of work in a manner that specifies expected results or goals to be achieved.
6. Sufficient follow-up and control by the supervisor.

Ability to delegate responsibility effectively can be developed, and represents one of the greatest challenges of any potential supervisor/executive.

*SECRETARIAL OCCUPATIONS V-TECS GUIDE.

ORIENTING EMPLOYEES

How a new employee is treated the first day on the job is an important factor in morale building in any office. Large organizations usually have a formal orientation program, including films, slides, and lectures which acquaint the new employee with the history, products or services, and fringe benefits of the company. Information related to his/her specific job, however, is left to the immediate supervisor. It will be your responsibility to explain and demonstrate the tasks of the job and help the employee adjust to the new job.

The process of introducing new employees to the organization and to their individual work units and jobs is called induction or ORIENTATION. The main objectives of the orientation process are to:

1. Welcome new employees and make them feel a part of the organization.
2. Familiarize them with organizational goals, philosophy, history, operational structure, products or services, and physical facilities.
3. Communicate basic information such as policies, procedures, rules, fringe benefits, and pay periods.
4. Present the duties and responsibilities of the job.

The length of the orientation or break-in period and the overall cost of the program will vary according to the nature of the job or assignment, the amount of knowledge and skill the employee already has, the employee's ability to learn those things that must be learned to become reasonably competent on the job, and the conditions under which the employee must learn.

In many small and medium-sized firms, the orientation of new employees is an informal, unplanned process. The new employee is greeted as she/he arrives, introduced to a few employees, given some work, and told to ask questions as they come up. However, a more effective work environment can be created with a well thought out, extensive orientation program. The employee should be provided with an understanding of how job performance contributes to the success of the organization and how the services or products of the organization contribute to society. Orientation should be a carefully planned systematic, and effective introduction of new workers to their jobs so that they may start working with a minumum of delay, misunderstanding, and error.

Many firms used an EMPLOYEE HANDBOOK as part of their orientation program, which contains general company policies and information. Supplementing this handbook is an INDUCTION CHECKLIST, which contains a list of topics that a supervisor should cover when introducing new employees to their jobs. This checklist is one of the most effective means of making sure that new employees are properly introduced to the firm and to their jobs. Such a checklist ofter provides for an orientation program that extends over a period of about two weeks. The checklist may be followed by a formal induction class in which company-wide information, such as company history, salary increases, promotion plans, and social activities, are discussed.

If a new employee participates in a general orientation program, other specific areas should be covered by the employee's supervisor--such as the relationship between the employee's position and other positions in the department, policies of the department, expectations of the supervisor, goals of the department, and specific job duties.

To help employees adjust more rapidly, some organizations use a "buddy system" or SPONSOR SYSTEM, in which experienced employees work with new employees-explaining work procedures, demonstration job-related equipment, and answering their questions. This system often works very well, since new employees may hesitate to ask questions of their supervisor and feel more comfortable doing so with fellow workers. The sponsor system relieves a supervisor or department head of part of the orientation process, and serves to give sponsors an added sense of responsibility and participation (which aids their own self-improvement). When selecting a sponsor to orient a new employee, you should choose someone who has a job similar to the one assumed by the new worker, a complete knowledge of company policies and department operations, a pleasant outgoing personality , a positive attitude, and an interest in people and their problems.

Orientation methods vary. The most frequently used methods include verbal, written, and audiovisual. Verbal orientation involves a one-on-one situation or group situation, while written orientation typically involves the use of handbooks or manuals. Audiovisual presentations consist of films, slide-tape presentations, and closed-circuit television. Other helpful information for the orientation process includes an organizational chart, map of the premises (if a very large or multi-building organization), copy of the union contract (if appropriate), copy of the performance appraisal form and outline of procedures used, copy of emergency/vacation procedures, a list of names and telephone numbers of key organizational employees, and organizational manual(s).

The employee's performance, success, or self-satisfaction during and/or upon completion of the orientation program is often measured. Once training is completed, informal and formal evaluative checks are also conducted, which evaluate the trainee's performance and occupational adjustment on the job.

Orientation programs are not limited to only new employees. When new policies or procedures are initiated or new equipment purchased, programs may be conducted for all employees in order to keep them up-to-date, improve their job performance, or prepare them for more responsibilities. Some organizations offer special training programs for the physically handicapped, and federally sponsored programs are being conducted to help those who are occupationally disadvantaged.

*SECRETARIAL OCCUPATIONS V-TECS GUIDE.

INTERVIEWING APPLICANTS

The employment interview has traditionally been one of the most frequently used procedures in the selection process, and is considered by many to be the most crucial step. The interview can be used to:

1. Ask questions to clarify any ambiguous areas about the applicant's background.
2. Emphasize areas of particular concern to the organization.
3. Assess the applicant's self-expression, confidence, poise, and appearance.
4. Give the applicant an opportunity to ask additional questions about the job and the organization.
5. Allow the applicant to emphasize certain areas about his/her background that might be helpful in making an employment decision.

The primary purpose of an interview is to try to determine the applicant's ability to do a particular job. Effective interviewing is difficult to master, but the need for this skill is essential.

There are several different interview methods designed to obtain information and elicit attitudes and feelings from an applicant. The most significant difference among them is the amount of structure, or control, exercised by the interviewer during the course of the interview. The interviewer may determine the entire direction of the interview by the questions asked, or she/he may allow the applicant a large role in determining the way in which the discussion will go.

The SCREENING INTERVIEW is not really a type of interview used in the selection process, but is used to screen job applicants before they are asked to come back for an employment interview. Skillful interviewers are usually able to determine which applicants are obviously not qualified for the position, thus conserving time and effort for the interviewer and the applicant. The screening interview is usually very brief and an effort is made to develop rapport with the applicant. In this way, subsequent interviews with the applicant are probably more realistic, and the information provided more valid.

In the DIRECT INTERVIEW, applicants are asked direct questions related to their qualifications and ability to fill the requirements of the job. This type of interview is often used when interviewing for lower-level jobs and when time is limited. The direct interview approach is very structured, and does not delve into the areas of attitudes or needs. "Yes" and "no" or short responses are sought to specific question such as:

1. "Do you take shorthand?"
2. "How many years of secretarial experience do you have?"
3. "Are you willing to travel once a month?"
4. "How fast can you type?"

The INDIRECT INTERVIEW is an unstructured approach based upon the idea that more can be learned about applicants by stimulating them to talk about themselves than by asking them direct questions. Open-ended questions are usually asked to free the applicant to discuss anything she/he desires, with the aim of getting opinions and ideas from the applicants and an index of their value systems. The interviewer gives the applicant maximun freedom by asking very broad, general questions such as:

1. "Tell me about your educational experiences."
2. "What are your long-range goals?"
3. "What do you think are your major strengths and weaknesses?"
4. "What foreign languages can you speak fluently?"

The FUNCTIONAL INTERVIEW is comprised of a series of job-related questions accompanied by predetermined answers, with all applicants responding to the same questions. Four types of questions are generally used in the functional interview: what-if questions, job knowledge questions, job sample questions, and attitude questions. An interview committee is used with the functional interview, and the committee is responsbile for evaluating the worth of applicant responses as well as preparing the interview questions and desired answers. Weights are assigned to various answers, and sample answers are realistic and based on present job requirements. The most significant advantages of this interview method are its reliability and accuracy, since it minimizes the subjectivity and inconsistency often present in other types of interviews.

Another interview method, used particularly with supervisory-level personnel and especially in the government and military, is the STRESS INTERVIEW. This method tests the amount of pressure the applicant can take, and can be handled by one or more interviewers. A single interviewer sets up a situation in which the applicant must react to a nonroutine but realistic situation, in order to determine how well the applicant can handle the stress that is generated. With group interviewers, several seemingly unfriendly interviewers continuosly ask probing questions of the applicant, also to judge how well she/he handles the stressful situation.

The interviewer should be on guard against arriving at hasty conclusions regarding the personality, intelligence, skills, and abilities of the applicant. The interviewer must create the most friendly and relaxed environment possible (except in the case of the stress interview) for the applicalicant. A great deal of information must be identified in less than thirty minutes, so adequate preparation is important. The interviewer should follow these guidelines:

1. Hold the interview where you will not be interrupted.
2. Be friendly, speak quietly, and encourage the applicant to talk.
3. Do not overreact to the applicant's comments and do not argue.
4. Be an attentive listener--look attentive, nod, and appear interested.
5. Let applicants finish their answers and do not try to rush them.
6. Clear up any gaps in the application form and/or resume.
7. Give the applicant facts about the organization.
8. Give a brief description of the open position, its responsibilities, and its relationship to the rest of the organization.
9. Discuss policy, compensation, and career ladders.
10. Avoid questions that may imply discrimination.
11. Conclude the interview tactfully, and tell applicants when you will notify them of the firm's decision.

To avoid discriminating against any ethnic or cultural group, special attention must be focused on the legal considerations of the selection process. Special attention also should be focused on the culturally disadvantaged. The Equal Employment Opportunity Act of 1972 prohibits the use of any selection test that unfairly discriminates against any applicant. You should be aware of all legal points involved in the selection and hiring process.

*SECRETARIAL OCCUPATIONS V-TECS GUIDE.

ANNOTATED BIBLIOGRAPHY

BUSINESS COMMUNICATION

Branchaw, B. P. ENGLISH MADE EASY. Gregg/McGraw-Hill Book Company, Novato, CA. 2ND ED. 1986.

The textbook provides 45-60 hours of instruction and covers grammar, punctuation, style, capitalization, number usage, and word usage.

Burtness, Paul S., and Jack E. Hulbert. EFFECTIVE BUSINESS COMMUNICATION. South-Western Publishing Company, Cincinnati, OH. 1985.

This text covers oral and written communication.

Camp, Sue C. DEVELOPING EDITING SKILL. Gregg/McGraw-Hill Book Company, Novato, CA. 1985.

Through a series of real-world applications, this textbook cultivates the necessary competencies in grammar, usage, spelling, and punctuation, as well as effective style and proper formatting. By editing a range of business communications, students learn how to use revision symbols and prepare communications that are accurate, complete, courteous, concise, and consistent.

Lee, Jo Ann. PROOFREADING SKILLS FOR WORD PROCESSING. Harcourt Brace Jovanovich, Orlando, FL. 1986.

The text provides techniques for proofreading both on-screen and paper copy. Lessons and exercises provide experience in the basic areas of proofreading, format, word division, capitalization, and spacing.

Luke, Cheryl M., and Ann J. Swafford. COMMUNICATIONS SKILLS FOR WORD PROCESSING. Harcourt Brace Jovanovich, Orlando, FL. 1986.

This text/workbook provides instruction in essential written communication skills--such as punctuation, capitalization, grammar and usage as well as instruction in developing listening and speaking skills.

Mansfield, Carmella E., and Margaret H. Bahniuk. WRITING BUSINESS LETTERS AND REPORTS. Glencoe Publishing Company, Encino, CA. 2ND ED. Date unavailable.

The textbook provides instruction from the basic concepts of communication and the fundamentals of writing to specialized areas of communication. The book emphasizes interoffice memorandums, oral presentations, persuasive requests, and informal summary and analytical reports.

McComas, Donna, and Marilyn Satterwhite. MODERN BUSINESS CORRESPONDENCE. Gregg/McGraw-Hill Book Company, Novato, CA. 5TH ED. 1986.

This textbook provides instruction to help students learn to write effective business letters, memoranda, and informal reports. The book includes examples, case problems, exercises, and a reference section

Murphy, Herta A., and Herbert W. Hildebrandt. EFFECTIVE BUSINESS COMMUNICATIONS. Gregg/McGraw-Hill Book Company, Novato, CA. 4TH ED. 1984.

The book emphasizes both oral and written communication. Over 200 examples---including letters, memos, reports, mailgrams, and resumes--are provided demonstrating key techniques and ideas.

Reigel, Charles. BASIC LANGUAGE SKILLS. Glencoe Publishing Company, Encino, CA. Date unavailable.

This text/workbook emphasizes sentence structure, punctuation, capitalization, abbreviations, numbers, spelling, word divisions, formats, and editing.

Sheff, Donald A. BUSINESS CORRESPONDENCE. Bobbs-Merrill Educational Publishing, Indianapolis, IN. Date unavailable.

The textbook is divided into two sections: Part one deals with the importance of understanding words and Part two develops and polishes the student's ability to write business letters to meet specific situations.

Stewart, Marie M., Kenneth Zimmer, Lyn Clark. BUSINESS ENGLISH AND COMMUNICATION. Gregg/McGraw-Hill Book Company, Novato, CA. 6TH ED. 1984.

The book includes a presentation of the basics of grammar, punctuation, and style; business correspondence; and listening and speaking.

Whalen, Patricia. BASIC SKILLS FOR THE MODERN OFFICE. South-Western Publishing Company, Cincinnati, OH. 1984.

This textbook includes discussions on proofreading, using an electronic typewriter, filing, statistical typing, and word processing.

Williams, John W., and Steven A. Eggland. COMMUNICATION IN ACTION. South-Western Publishing Company, Cincinnati, OH. 1985.

This text is designed to reflect the current emphasis on effective communication skills.

Wittenberg, M. A., and P. R. Voiles. MODERN BUSINESS ENGLISH. Gregg/McGraw-Hill Book Company, Novato, CA. 7TH ED. 1986.

This book provides instruction in grammar, punctuation, and style as they apply to business communication. It is designed for completion in one semester.

Briggs, J. Robert, and Eugene J. Kosy. ELECTRONIC CALCULATORS & OFFICE MACHINES WITH BUSINESS MATH APPLICATIONS AND SIMULATION. South-Western Publishing Company, Cincinnati, OH. 4TH ED. 1984.

This textbook is designed to assist students in acquiring competence with calculators and office machines. Jobs are provided on the electronic calculator, pocket calculator, 10-key, and full-keyboard machines. Metrics and reprographics are covered. A realistic simulation provides students with an opportunity to apply skills that they have learned.

Pasewark, William R. ELECTRONIC DISPLAY CALCULATOR. South-Western Publishing Company, Cincinnati, OH. 2ND ED. 1984.

This textbook provides operational instruction through the touch system. The book includes thirty practical jobs.

Pasewark, William R. REPROGRAPHICS: COPIER, OFFSET, STENCIL, FLUID. South-Western Publishing Company, Cincinnati, OH. 3RD ED. 1984.

This text/workbook covers all of the standard duplicating processes, plus pertinent information needed for evaluating and choosing reprographic equipment to fit specific job requirements.

Fosegan, Joseph S. ALPHABETIC INDEXING RULES--APPLICATION BY COMPUTER. South-Western Publishing Company, Cincinnati, OH. 1984.

In this 5-session text-workbook, all the alphabetic indexing rules needed to work efficiently with any alphabetic filing system are presented. Exercises provide practice in indexing names of individuals, businesses, institutions, organizations, and government agencies.

Holmes. FILING MADE EASY: A FILING SIMULATION. Houghton Mifflin Company, Boston, MA. 2ND ED. 1985.

The 15-20 hour training program teaches the fundamentals of alphabetic, geographic, subject, and numeric filing and stresses standard filing procedures bases on ARMA rules.

Fuller, Robert W. PAYROLL PROCEDURES. South-Western Publishing Company, Cincinnati, OH. 9TH ED. 1985.

This textbook provides hands-on experience preparing the payroll for an industrial manufacturer.

Palmer, C. E., and V. A. Pacey. ACCOUNTING FOR THE MODERN OFFICE. Gregg/McGraw-Hill Book Company, Novato, CA. 1985.

Designed for use in either one-semester or one-quarter courses, this book concentrates on the practical aspects of accounting.

Rosenberg, H. J., C. C. Swinney, S. Van Sickle. PROJECTS IN BUSINESS RECORD KEEPING. South-Western Publishing Company, Cincinnati, OH. 5TH ED. 1985.

This text/workbook contains instructional material for the preparation of monthly statements, keeping accounts receivable records, summary sheets, computing sales taxes, filing out sales slips, preparing payroll records, writing checks and deposit slips, and recording cash receipts and cash payments.

Kmech, Visaggi, COMPREHENSIVE MACHINE TRANSCRIPTION COURSE. Dictation Disc Company, New York, NY. Date unavailable.

This textbook provides a comprehensive machine transcription course and teaches spelling and punctuation in a systematic, cumulative fashion.

Bittel, Lester R., Ronald S. Burke, R. L. Laforge. BUSINESS IN ACTION: AN INTRODUCTION TO BUSINESS. Gregg/McGraw-Hill Book Company, Novato, CA. 2ND ED. 1984.

This introductory textbook includes information on business cycles, money supply, electronic banking, accounting standards, and business data processing.

Daggett, W. R. THE DYNAMICS OF WORK. South-Western Publishing Company, Cincinnati, OH. 1984.

Topics covered: human relations, problem solving and desision making, economics of work, and computer literacy.

Fosbury, Frank. AUTOMATED OFFICE--FILMSTRIPS AND CASSETTES. South-Western Publishing Company, Cincinnati, OH. 1984.

The 2-volume set provides a visual impression of the various types of equipment used in the automated office. Narrative synchronized with photographs, illustrations, and graphic charts is used to describe the equipment and its components and to explain the kind of work each piece of equipment is designed to perform.

JOB ATTITUDES PROGRAM. Career Aids, Inc., Chatsworth, CA. Date unavailable.

This 6-part series of filmstrip/cassette programs is designed to develop positive job attitudes. The topics covered are: The Company and the Community, The Company and Profit, Company Organization, The Role of the Supervisor, The Importance of Attitude, and Developing Good Attitudes.

Keeling, B. L., N. F. Kallaus. ADMINISTRATIVE OFFICE MANAGEMENT. South-Western Publishing Company, Cincinnati, OH. Abridged, 8TH ED. 1984.

Topics include: Part I-Introduction to Administrative Office Management; Part II-Managing Human resources; Part III-Managing Administrative Services; Part IV-Controlling Administrative Operations.

Hampton, David R. MANAGEMENT. Gregg/McGraw-Hill Book Company, Novato, CA. 3RD ED. 1986.

This textbook includes the following topics: I-The basis of Management Theory and Science; II-Planning; III-Organizing; IV-Staffing; V-Leading; VI-Controlling.

SECRETARIAL OCCUPATIONS V-TECS GUIDE. V-Tecs, Atlanta, GA. 1984.

Steade, Richard, James Lowry, Raymond Glos. BUSINESS: ITS NATURE AND ENVIRONMENT--AN INTRODUCTION. South-Western Publishing Company, Cincinnati, OH. 10TH ED. 1984.

Topics include: Part I-Overview of American Business; Part II-Management and Organization of Human Resources; Part III-Production and Productivity; Part IV-Marketing; Part V-Accounting and Finance; Part VI-Information Management and Controls.

Crawford, T. James, Lawrence W. Erickson, Jerry W. Robinson, Lee R. Beaumont, Arnola C. Ownby. CENTURY 21 TYPEWRITING. South-Western Publishing Company, Cincinnati, OH. 3RD ED. 1982.

A comprehensive textbook to develop typewriting skills.

Crawford, T. James, Lawrence W. Erickson, Jerry W. Robinson, Lee R. Beaumont, Arnola C. Ownby. MICROCOMPUTER KEYBOARDING FORMATTING APPLICATION. South-Western Publishing Company, Cincinnati, OH. 1986.

This instructional package consists of 3 text/workbooks each accompanied by 3 diskettes. The 3 text/workbooks in the package are:

MICROCOMPUTER KEYBOARDING/FORMATTING APPLICATIONS:
LETTER FORMATTING

MICROCOMPUTER KEYBOARDING/FORMATTING APPLICATIONS:
REPORT FORMATTING

MICROCOMPUTER KEYBOARDING/FORMATTING APPLICATIONS:
TABLE FORMATTING

Each book includes a description of each type of document to be formatted, guides for formatting it, a correctly formatted sample, and 3 sets of formatting problems--computer-formatted, typewriter-simulation, and word processor-simulation.

Lloyd, A. L., F. E. Winger, J. E. Johnson, R. A. Hall, P. C. Morrison, J. L. Rowe. GREGG TYPING SERIES SEVEN. Gregg/McGraw-Hill Book Company, Novato, CA. 1985.

GREGG TYPING offers users the option of selecting a Complete Course text that contains all 300 lessons needed for a two-year typewriting program or two separate one-year student texts, 150 lessons each.

Simcoe, Annell L., Leona M. Gallion, Carol Mauermeyer, Joanne Sanvardine. KEYBOARDING FOR THE AUTOMATED OFFICE. John Wiley & Sons, Inc., New York, NY. 1986

The multicomponent program integrates traditional typewriting (keyboarding) instruction with the processing of documents on automated office equipment--electric typewriters, electronic memory typewriters, and microcomputers.

Booher, Dianna. THE NEW SECRETARY. Facts on File Publications. 1985.

The major sections of the book are: Part I-Contributing to the Team Effort; Part II-Cooperating With Clients and Customers; Part III-Preparing Yourself to Meet the Challenge.

Fruehling, Rosemary T., and Constance K. Weaver. ELECTRONIC OFFICE PROCEDURES. Gregg/McGraw-Hill Book Company, Novato, CA. 1987.

This textbook presents a comprehensive overview of the electronic office. The text integrates instruction about procedures related to modern technology with instruction in basic skill areas.

Fulton, Patsy J., Joanna D. Hanks, J. Sargeant Reynolds. PROCEDURES FOR THE PROFESSIONAL SECRETARY. South-Western Publishing Company, Cincinnati, OH. 1985.

The text discusses such topics as the role of the secretary, human relations, secretarial procedures, telecommunications, word and data processing, and records management. It also contains a Reference Section, which reviews language arts rules.

Kupsh, Joyce, and Sandra Whitcomb. THE ELECTRONIC OFFICE. Glencoe Publishing Company, Encino, CA. Date unavailable.

This text describes the impact of new technology on fields such as word and data processing, reprographics, telecommunications, records management, and ergonomics.

Kutie, Rita C., and Joan L. Rhodes. SECRETARIAL PROCEDURES FOR THE ELECTRONIC OFFICE. John Wiley & Sons, Inc., New York, NY. 2ND ED. 1986.

This text/workbook covers the basics for secretaries. The book includes instruction in all the practical aspects of office work, including math, reading, and writing skills, and simulates real office situations.

Luke, Cheryl M., and C. B. Stiegler. OFFICE SYSTEMS AND PROCEDURES. Houghton Mifflin Company, Boston, MA. 1986.

This textbook covers basic office skills including scheduling appointments, using the telephone and telecommunications systems, word/information processing, filing, time management, and proofreading.

Moon, H. R. OFFICE PROCEDURES AND TECHNOLOGY. MPC Educational Publishers, Bronx, NY. Date unavailable.

The textbook covers communication, mail/shipping services, telephone skills, financial records, letter/reports/memos, reprographics, planning meeting/conferences, planning business travel, and using reference materials.

Quible, Zane K. ADDMINISTRATIVE OFFICE MANAGEMENT: AN INTRODUCTION. Reston Publishing Company, Reston, VA. 3RD ED. 1984.

This text/reference manual presents a broad view of administrative office management principles, and emphasizes development and changes during the last few years--including office automation and the renewed interest in office productivity. The topics are divided into five units: principles of administrative office management; management of the office environment; office employees; office systems; and office functions. Chapters covering the maintenance of policy and procedures manual, maintaining an inventory of supplies and equipment, maintenance of office equipment, reprographic processes, and office layout are included.

Robert, Henry M., and Sarah C. Robert. ROBERT'S RULES OF ORDER. Scott Foresman and Company, Glenview, IL. 1981.

Rosen, Arnold, Eileen Feretic, Margaret H. Bahniuk. ADMINISTRATIVE PROCEDURES FOR THE ELECTRONIC OFFICE. John Wiley & Sons, Inc., New York, NY. 2ND ED. 1985.

A comprehensive textbook that covers organizing and planning work flow, written business communication, human relations, records management, filing procedures, locating and using reference tools, making travel arrangements, setting up meetings, processing mail, and telephone techniques.

Tedesco, Eleanor H. ADMINISTRATIVE OFFICE MANAGEMENT: THE ELECTRONIC OFFICE. John Wiley & Sons, Inc., New York, NY. 1984.

A comprehensive introduction to the administration systems and services the office manager must contend with. The book covers instruction in designing and managing the automated office, including chapters on word processing, data processisng reprographics, records management, micrographics, and telecommunication.

Waggoner, Kathleen P., and Mary M. Ruprecht. OFFICE AUTOMATION: A MANAGEMENT APPROACH. John Wiley & Sons, Inc., New York, NY. 1984.

This book covers new and developing automated office technology from a management perspective. Topics include information on word and information processors, laser printers, video or optical storage, electronic records storage and retrieval systems, microcomputers, management techniques for designing the system, choosing equipment, and staffing considerations.

PERSONAL ATTRIBUTES

Bixler, Susan. "The Professional Image." South-Western Publishing Company, Cincinnati, OH. 1985.

"The Professional Image" is a 20-minute audiovisual program designed to reinforce the importance of an effective business appearance for both men and women.

Golden, Nancy J. DRESS RIGHT FOR BUSINESS. Gregg/McGraw-Hill Book Company, Novato, CA. 1986.

This text is designed to help the student build an attractive, affordable business wardrobe and empasizes how people's dress influences the impressions they make on others.

Shinn, George. LEADERSHIP DEVELOPMENT. Gregg/McGraw-Hill Book Company, Novato, CA. 2ND ED. 1986.

This text covers the personal attributes and social skills needed in the business world.

REFERENCE

ARIZONA BUSINESS OCCUPATIONS COMON-CORE COMPETENCY INSTRUCTION MODULES. Arizona Department of Education, Phoneix, AZ. 1982.

ARIZONA BUSINESS OCCUPATIONS COMPETENCY-BASED CURRICULUM GUIDE. Arizona Department of Education, Phoenix, AZ. 1980-81.

Kutie, Rita C., and Virginia R. Huffman. THE WILEY OFFICE HANDBOOK. John Wiley & Sons, Inc., New York, NY. 2ND ED. 1984.

This book provides a source of information on grammar and spelling, formats for business communications, proofreading techniques, and punctuation.

Sabin, William A. THE GREGG REFERENCE MANUAL. Gregg/McGraw-Hill Book Company, Novato, CA. 6TH ED. 1985.

SUPERVISING

Bittel, Lester R. WHAT EVERY SUPERVISOR SHOULD KNOW: THE BASICS OF SUPERVISORY MANAGEMENT. Gregg/McGraw-Hill Book Company, Novato, CA. 5TH ED. 1985.

The book focuses on the techniques and practices involved in managing people and coping with materials, machines, money, information, and time to achieve results in terms of product or service output, quality, and cost.

Boyd, Bradford B. MANAGEMENT-MINDED SUPERVISION. Gregg/McGraw-Hill Book Company, Novato, CA. 3RD ED. 1984.

This text explains the full scope of the supervisor's responsibilities. Content is built around three major resources of the supervisor: management-mindedness, leadership, and job knowledge.

Newman, William M. DESIGNING INTEGRATED SYSTEMS FOR THE OFFICE ENVIRONMENT. Gregg/McGraw-Hill Book Company, Novato, CA. 1986.

The book provides analytical coverage of the key topics involved in successfully applying new office technology. The major sections of the book are: The Office Environment, Integrated Systems Technology, Integrated Systems, Office Systems and Organization.

TELEPHONE

"Using the Business Telephone." Prentice-Hall Media, Englevood Cliff, NJ. Date unavailable.

This filmstrip/cassette series provides a survey of phone company services and good telephone techniques.

Dorick, Herbert S. UNDERSTANDING MODERN TELECOMMUNICATIONS. Gregg/McGraw-Hill Book Company, Novato, CA. 1986.

This book presents the fundatmental principles of telecommunications in an non-technical style. The book focuses on the functions of communications and computer technology.

Farmer, Graham. KEYBOARDING: AN INTRODUCTORY COURSE. Jenkins Forkner Publishing Corporation, Agincourt, Ontario, Canada. 1985.

The text is designed to teach beginners to operate the alphabetic and non-alphabetic keyboards in thirty hours by the touch system.

Lloyd, A. L., F. E. Winger, R. P. Poland, R. N. Hanson, A. Rossetti, S. Ober, J. L. Rowe. GREGG COLLEGE TYPING, SERIES FIVE. Gregg/McGraw-Hill Book Company, Novato, CA. 1985.

A comprehensive textbook for developing typing skills.

WORD PROCESSING

Barber, Lina Grace. WORD/INFORMATION PROCESSING; CONCEPTS AND APPLICATIONS. Bobbs-Merrill Publishing Company, Indianopolis, IN. 1984.

This textbook offers a balance between word processing concepts and hands-on instruction.

Bergerud, Marly L., and Jean Gonzalez. WORD PROCESSING CONCEPTS AND CAREERS; A STEP TOWARD OFFICE AUTOMATION. John Wiley & Sons, Inc., New York, NY. 3RD ED. 1984.

The textbook provides an introduction to word processing office systems, equipment, and procedures.

Brooks, Lloyd D. WORD PROCESSING EXERCISES. Gregg/McGraw Hill Book Company, Novato, CA. 1986.

This book provides a series of short word processing exercises.

Casady, Mona J. WORD/INFORMATION PROCESSING CONCEPTS. South-Western Publishing Company, Cincinnati, OH. 2ND ED. 1984.

This text/workbook is designed to introduce students to the basic concepts of word processing and to the changes word processing is making in today's offices.

Casady, Mona J., and Dorothy Sandburg. WORD/INFORMATION PROCESSING--A SYSTEM APPROACH. South-Western Publishing Company, Cincinnati, OH. 1985.

This textbook covers the basic concepts of word processing as a part of a totally integrated information processing system. The major sections of the book are: Part I-Introduction to Word Processing; Part II-Information Processing Cycle; Part III-Implementing Change in the Office; Part IV-Information Processing in Action.

Clark, James F., and Judith J. Lambrecht. INFORMATION PROCESSING: CONCEPTS, PRINCIPLES, AND PROCEDURES. South-Western Publishing Company, Cincinnati, OH. 1985.

The major sections of the book are: Part I-Impact of the Computer on Society; Part II-The Electronic Computer System; Part III-Information Processing; Part IV-Software Concepts; Part V-Applications Programming Languages; Part VI-Careers; and Part VII-Historical Review.

Ettinger, Blanche, and Edda Perfetto. MACHINE TRANSCRIPTION: LANGUAGE SKILLS FOR INFORMATION PROCESSING. Science Research Associates, Inc., Chicago, IL. 1984.

The textbook contains a variety of activities that contribute to skill development in language arts, including keyboarding from various types of input, formatting, editing proofreading, listening, and decision making. The dictated messages in the tapes focus on a variety of career fields.

Hawkins and Bloom. OCEANVIEW ASSOCIATES, INC: A WORD PROCESSING PRACTICE SET. The H. M. Rowe Company, Baltimore, MD. Date unavailable.

This practice set simulates the position of administrative assistant at a travel agency. Tasks develop from basic to advanced; students complete jobs that involve editing, formatting, pagination, cutting and pasting, library documents, and list processing.

Lucas, Henry C. INFORMATION SYSTEMS CONCEPTS FOR MANAGEMENT. Gregg/McGraw-Hill Book Company, Novato, CA. 3RD ED. 1986.

This textbook provides coverage of microcomputer, electronic spreadsheet processing, word processing, electronic mail, personal filing systems (DBMS), and software for graphics presentation.

Popyk, Marilyn K. WORD PROCESSING AND INFORMATION SYSTEM. A PRACTICAL APPROACH TO CONCEPTS. Gregg/McGraw-Hill Book Company, Novato, CA. 2ND ED. 1986.

The book covers word processing (cycle, equipment, office organization, and careers) and information systems (reprographics, distribution/communication, and storage and retrieval) to provide the conceptual understanding needed for entry-level jobs.

Sherster, Joyce A. SUN ISLAND HOTEL: A WORD PROCESSING SIMULATION. Harcourt Brace Jovanovich, Orlando, FL. 1986.

The simulation provides experience in keyboarding letters, lists, statistical information, and forms.

Varner, Jane T. WORD PROCESSING OPERATIONS: DOCUMENT PREPARATION. Science Research Associates, Inc., Chicago, IL. Date unavailable.

The focus of the textbook is on document preparation performed on equipment configurations that include microcomputers, dedicated word processors, and mainframe systems.